



WisDOT Contract Administration and Reporting System

Getting Access

Navigation and Tools

WisDOT and Consultant Dashboards

Invoicing

Evaluations



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WisDOT Contract Administration and Reporting System

Introduction

The Contract Administration and Reporting System (CARS) is used to manage and support WisDOT contracts. The system is currently used to manage contracts, including the following processes:

- Invoicing
- Evaluations

CARS is managed and supported by Consultant Services, which is part of the Division of Transportation System Development (DTSD) Bureau of Project Development (BPD).

For technical assistance, contact:

- CARS support Team WisDOTCARS@dot.wi.gov
- Sharon Bremser - State Consultant Services Supervisor sharon.bremser@dot.wi.gov 608-266-2375

Document Conventions

The instructions distinguish between “WisDOT” functions and “Consultants” functions by using these terms in the title of the description or instructions. For example, the content in *WisDOT: Dashboards* differs from that in *Consultants: Dashboards*. If a section does not specify one of these user types, then it applies to both types.

The terms “vendor” and “consultant” both refer to firms who contract with WisDOT. They are used interchangeably in this document.

Prime contracts, subcontracts and amendments are collectively referred to as “contracts” in this manual, but they are not equal in CARS. Each type of contract is handled differently in the system.

Paths (a sequence of menu and page links) to particular pages are marked as “Path:” and start with the main menu. Elements in the path are separated by an arrow (→). There may be more than one possible path to a particular page, but only one is noted.

Some images are condensed to show the relevant parts of a page in the confines of the printed page while maintaining legibility. Portions of the actual page may be cut out or cut off, and large blank may be condensed so the field in the image appears much smaller than it is in CARS. Sections of the page may be collapsed, which hides some of the content. The page may be narrowed, which can cause the control buttons at the top of the page to display in more than one row. The Help Desk contact number, and the date and time that always appear at the bottom of the actual page are rarely shown.

Instruction steps include fields that are required in the system and fields that trigger system actions. Be sure to enter all data as required by your region or bureau.



System Requirements

System requirements for CARS are found in [Appendix 1: System Requirements and Compatibility Settings](#). This appendix also describes compatibility settings for Internet Explorer, which can affect the appearance and function of CARS pages.

Getting Access

Basic access control is managed through the Consultant Services Section (CSS) of BPD. A completed *CARS Access Request* is needed for the following cases:

- All WisDOT employees
- WisDOT employees who need [Regional Administrator](#) access - These administrators manage groups of contracts assigned to management consultants and assign management consultant roles.
- Consultants who need [Vendor Administrator](#) access - These administrators can add and delete staff members for the firm and manage all of these staff members' access to the firm's data.
- Consultants who need [Management Consultant](#) access - These administrators can access specific contract, evaluation or invoice data as determined by their Regional Administrator. They can also access DOT data lists and search tools. Management Consultants cannot have the Regional Administrator roles.

Access to CARS requires a valid Web Access Management System (WAMS) ID.



Obtain a WAMS ID

You should never share your WAMS ID or password with anyone. WAMS IDs identify the user who completed a transaction in CARS.


The process for obtaining a WAMS ID requires a valid email address. To obtain a WAMS ID, use the following steps.

1. Go to the CARS log in page at <https://trust.dot.state.wi.us/cars/>
2. Click **Register for a Wisconsin User ID**.
3. Read the instructions and terms, and click **Accept** at the bottom of the page.
4. Complete the self-registration information. The following information is required:
 - a. First name
 - b. Last name
 - c. Email address.
 - Only one WAMS ID is allowed per email address.
 - Your email address is used in CARS to send notifications. You can change this address in your CARS profile. See [WisDOT: User Profiles](#) on page 50 or [Consultants: User Profiles](#) on page 61.
 - d. User ID requested for CARS (5 character minimum)
 - e. Password for CARS (7 character minimum)
 - f. Secret question for account recovery
 - g. Answer to the secret question for account recovery
5. Click **Submit**.
6. The system will send an automated email to the address you provided. Open the email and click the enclosed link. You must complete registration within the time period specified.
7. A new Internet Explorer window opens. Enter your WAMS ID and password, and then click **Login**.
8. The system opens a page confirming that your account is created and activated.
9. Click **Logout**.



Complete the CARS Request for Access Form

The DT1522 - *CARS Request for Access* form is included in [Appendix 2: CARS Access Request Form](#). It is also available online from the [CARS page](#) (<http://wisconsindot.gov/Pages/doing-bus/eng-consultants/cnslt-rsrcs/contracts/cars.aspx>). To complete the form, you must have a valid WAMS ID.

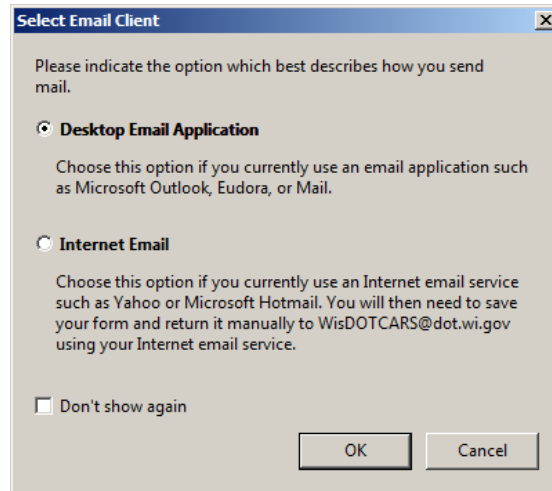
1. (Optional) Click **Save a copy**  on the toolbar to save the form to a convenient location on your computer.
2. (Optional) Open the saved version on your computer.
3. Select the type of access needed in the **Access Request Type** box. Access is described in [Appendix 3: WISDOT Roles and Actions in CARS](#) and [Appendix 4: Vendor Roles and Actions in CARS](#).
4. Complete the information in Section A.
5. WisDOT only: Select the permissions needed.
6. Click **Save**.

continued on next page



Complete the CARS Request for Access Form - continued

7. Click **Submit** to automatically email the form to the WisDOT CARS Security Administrators. Adobe Acrobat will open a message box asking you to indicate which type of email service you use.



- a. If you select **Desktop Email Application**, Acrobat creates and opens an email with the completed CARS Access Request form attached. Send the email as-is, or you can edit the message before you send it. If your email application is not running and you are not logged in, you will be prompted to open the application and sign in. Acrobat then creates the new message as described.
- b. If you select **Internet Email**, open your email account and create a new email to WisDOTCARS@dot.wi.gov. Include the completed form as an attachment.

Access requests are typically completed within 5 working days. You will receive email confirmation when access has been granted.



Security

Roles and Actions in CARS

Access to data in CARS is based on security roles assigned to the user by a security administrator. A **role** is a set of actions that a user performs to fulfill a job function. An **action**, such as manage or view, applies to a specific type of object, such as a prime contract, subcontract or an invoice. Roles in CARS are either vendor roles or DOT roles. A user can never have a mix of vendor roles and DOT roles.

Two different roles may have one or more actions in common. For example, many of the vendor roles contain the action *View Contract*.

WisDOT Roles

The CARS Administrator (WisDOTCARS@dot.wi.gov) and WisDOT Regional Administrators assign access for WisDOT staff members. See [Appendix 3: WisDOT Roles and Actions in CARS](#) on page 149 for current lists of WisDOT roles and actions.

Management Consultants

CARS Administrators assign access for Management Consultants. See [Appendix 5: Regional Administrator Instructions](#) on page 156 for Regional Administrator instructions.

Consultant Roles

Vendor Administrators assign access for the staff members at their firms. See [Appendix 6: Vendor Administration Instructions](#) on page 164 for Vendor Administrator instructions. See [Appendix 4: Vendor Roles and Actions in CARS](#) on page 153 for current lists of vendor roles and actions.

A user may be assigned more than one role, as determined by your firm or department administrator. For example, a staff member who submits invoices for contracts and reads evaluations may be granted both Invoice Submitter and View Evaluations roles.

The authority granted by roles is cumulative. For example, a consultant staff member who belongs to a group that can view evaluations for every prime contract in a region can also be granted access to view invoices for a specific individual prime contract in that group.



Log In to CARS

1. Navigate to the *Log In* page for CARS:
Production: <https://trust.dot.state.wi.us/cars/>
2. Enter your test WAMS ID in the **User ID** field.
3. Enter your test WAMS password in the **Password** field.
4. Click **Login**.

WISCONSIN DEPARTMENT OF TRANSPORTATION
Doing Business

WAMS
WEB ACCESS
MANAGEMENT SYSTEM

User ID: 2
Password: 3

4 Login

[Register for a Wisconsin User ID.](#)
[Edit your Profile.](#)
[Change your password.](#)
[Forgot your password.](#)


You are accessing the State of Wisconsin Local/Wide area network. This system is for authorized users only. All equipment, systems, services, and software connected to this network are intended only for the official business use of the State of Wisconsin. The State of Wisconsin reserves the right to audit, inspect and disclose all transactions and data sent over this medium in a manner consistent with State and Federal laws. By using this system you expressly consent to all such auditing, inspection and disclosure. Only software approved, scanned for virus, and licensed for State of Wisconsin use will be permitted on this network. Any illegal or unauthorized use of State of Wisconsin equipment, systems, services, or software by any person(s) may be subject to civil or criminal prosecution under state and federal laws, and may also result in disciplinary action where appropriate.

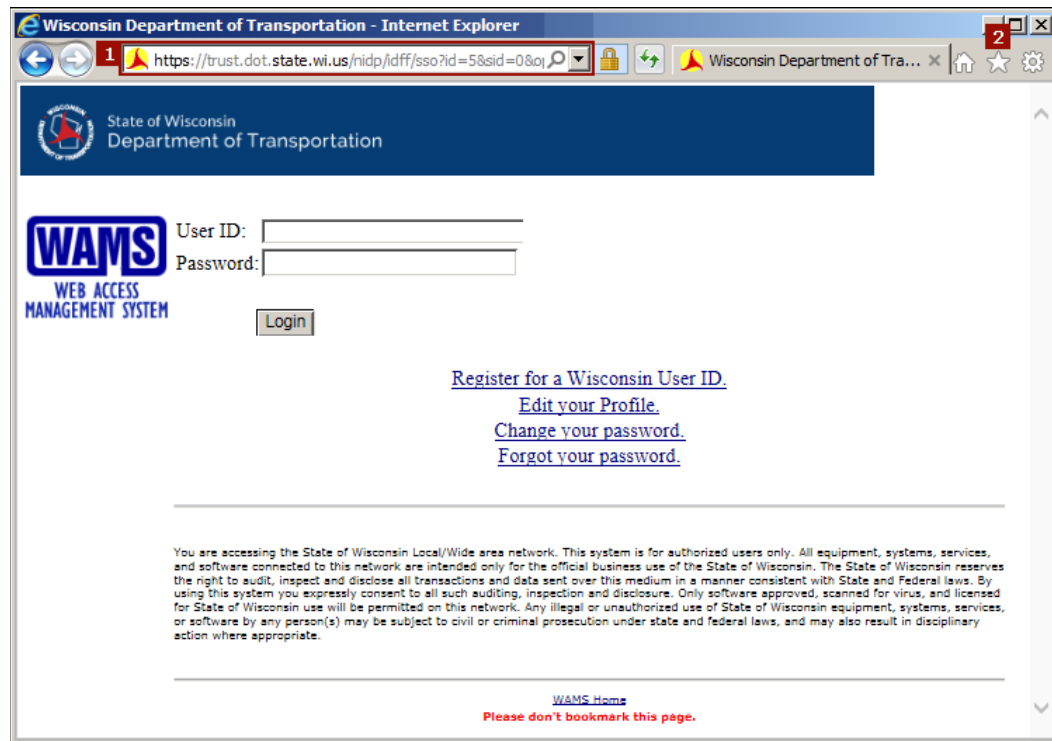
[WAMS Home](#)
Please don't bookmark this page.



Linking to the CARS Log In Page (Bookmarking)

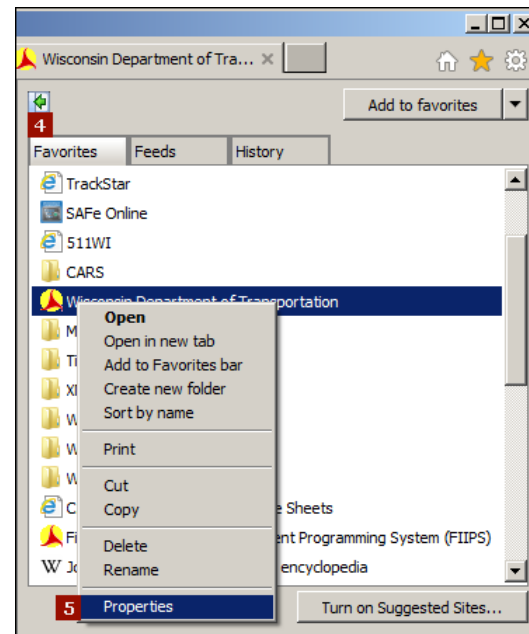
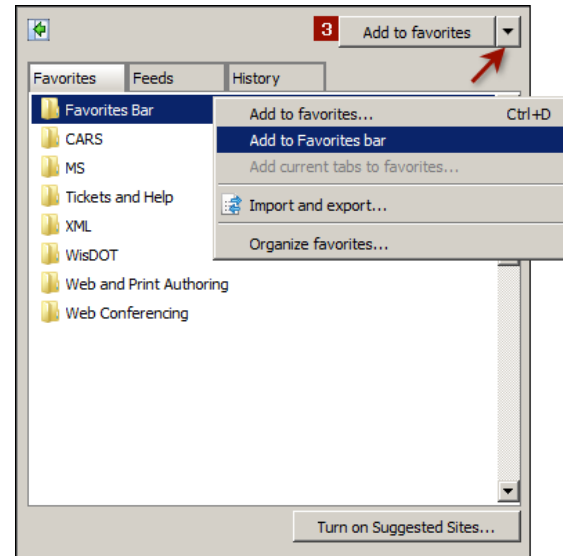
You can create a permanent link to the *CARS Log In* page. However, simply bookmarking the page without editing the link will not work. Use the following steps to bookmark the page.

1. Navigate to the *CARS Log In* page:
<https://trust.dot.state.wi.us/cars/>
Be sure to use lower case “cars” or the connection will fail.
Notice that the link shown in the address bar changes.
2. Click **Favorites** . Internet Explorer opens the **Favorites Center**.



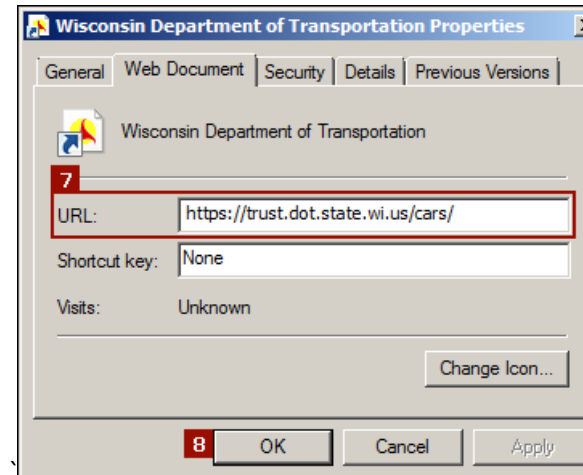
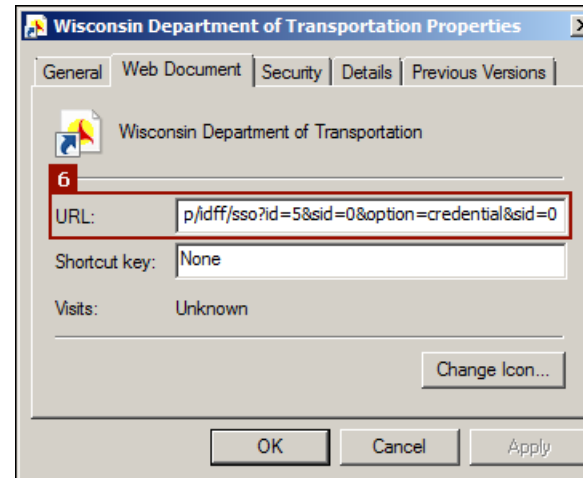
Linking to the CARS Log In Page (Bookmarking) - continued

3. Click **Add to favorites** to bookmark the page
-OR-
Click the **Add to favorites** arrow to see more options.
4. In your **Favorites** list, locate the new bookmark. The default name for the bookmark is “Wisconsin Department of Transportation”.
5. Right-click the new bookmark in the list, and then click **Properties**. Internet Explorer opens the bookmark’s property sheet.



Linking to the CARS Log In Page (Bookmarking) - continued

- On the **Web Document** tab in the **URL** field, find the end of the URL and backspace to delete the text until the URL reads “https://trust.dot.state.wi.us/”.
- Type “cars/” on the end of the URL.
- Click **OK**.
- Test your bookmark by clicking the link in your Favorites and logging in to CARS to make sure the link connects properly.



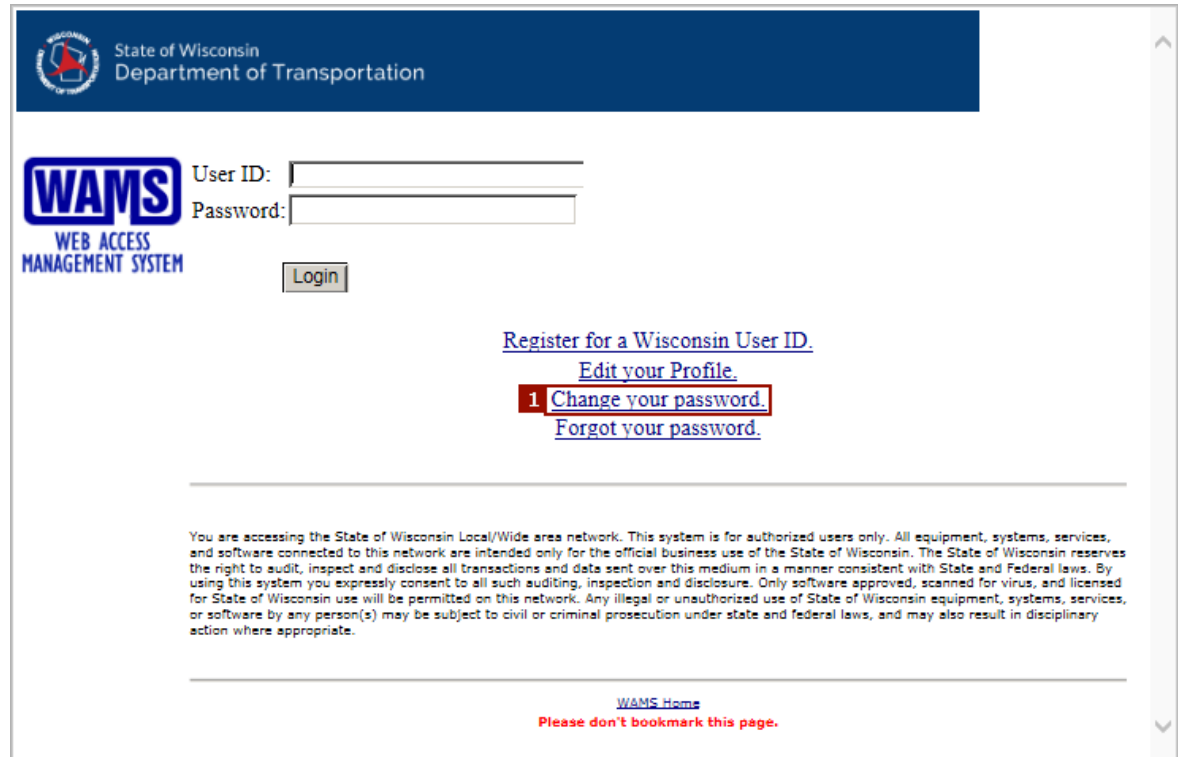
Change WAMS Password

Begin the process of changing your password by accessing the log in page for CARS.

Production: <https://trust.dot.state.wi.us/cars/>

Training: <https://acceptance.dot.state.wi.us/cars/>

1. Click **Change your password**. The *Profile Management Log In* page opens.



State of Wisconsin
Department of Transportation

WAMS
WEB ACCESS
MANAGEMENT SYSTEM

User ID:

Password:

Login

[Register for a Wisconsin User ID.](#)

[Edit your Profile.](#)

1 [Change your password.](#)

[Forgot your password.](#)

You are accessing the State of Wisconsin Local/Wide area network. This system is for authorized users only. All equipment, systems, services, and software connected to this network are intended only for the official business use of the State of Wisconsin. The State of Wisconsin reserves the right to audit, inspect and disclose all transactions and data sent over this medium in a manner consistent with State and Federal laws. By using this system you expressly consent to all such auditing, inspection and disclosure. Only software approved, scanned for virus, and licensed for State of Wisconsin use will be permitted on this network. Any illegal or unauthorized use of State of Wisconsin equipment, systems, services, or software by any person(s) may be subject to civil or criminal prosecution under state and federal laws, and may also result in disciplinary action where appropriate.

[WAMS Home](#)

Please don't bookmark this page.



Change WAMS Password - continued

2. Enter your WAMS ID in the **User ID** field.
3. Enter your current password in the **Password** field.
4. Click **Login**. The *Profile Management* page opens with your WAMS ID information shown.
5. In the **Account Information** section, click **Change Password**. The *Change Password* page opens.

WISCONSIN.GOV

WAMS WEB ACCESS MANAGEMENT SYSTEM

User ID:

Password:

Login

[Forgot your password? Is your account locked?](#)
[Request a Wisconsin User ID and Password.](#)

You are about to access a State of Wisconsin computer system. This is a restricted computer system for authorized users only. All equipment, systems, services, and software connected to this system are intended only for official business use of the State of Wisconsin, and may contain U.S. Government information. All data contained on this system is owned by the State of Wisconsin. The State of Wisconsin reserves the right to audit, monitor, record and/or disclose all transactions and data sent over this system in a manner consistent with State and federal law. Use of this system by any user, authorized or unauthorized, constitutes consent to monitoring, recording, reading, copying, or capturing and disclosure of data and transactions by authorized personnel. Only software and/or hardware approved, scanned, and licensed for State of Wisconsin use is permitted on this system. Any illegal, unauthorized use or modification of the State of Wisconsin data, equipment, systems, services, or software by any person(s) is prohibited and may be subject to civil or criminal prosecution under state and/or federal laws.

[WAMS Home](#) [Wisconsin Portal Home](#)
Please don't bookmark this page.

WISCONSIN.GOV

[Logout](#) [Help](#) [FAQ](#)

Profile Management

* Indicates Required Field

Profile Information

First Name *

Middle Initial

Last Name *

Suffix e.g., JR, SR, I, II, III

E-Mail * e.g., username@host.domain

Account Information

Your User ID must be between 5-20 characters and CAN be a combination of letters and numbers. User IDs are case sensitive.

User ID *

Password *

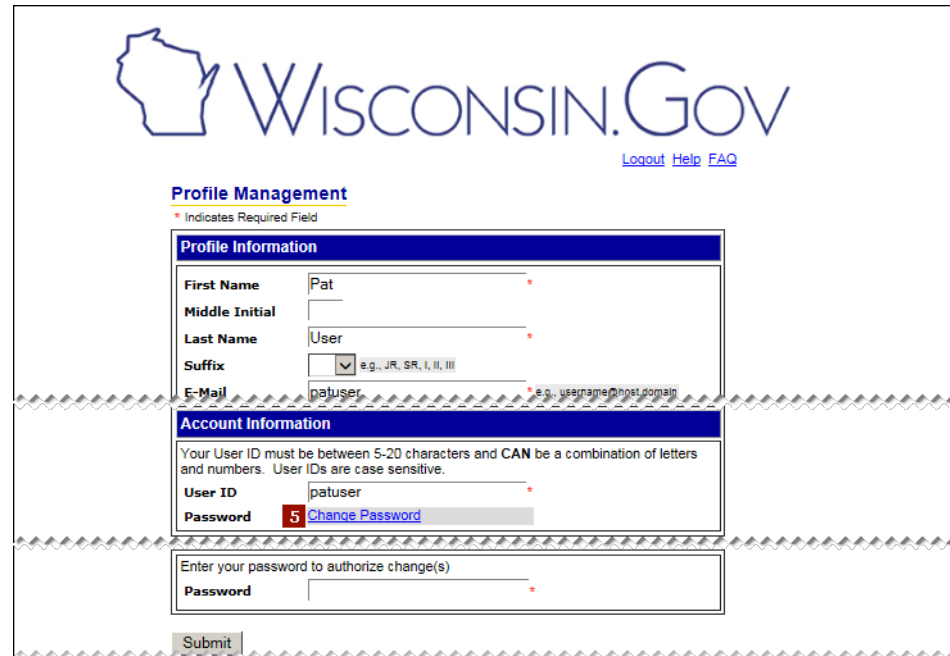
Enter your password to authorize change(s)

Password



Change WAMS Password - continued

6. Enter your current password in the **Current Password** field.
7. Enter a new password in the **New Password** field. The new password must meet the requirements stated in the paragraph above the fields.
8. Enter the new password again in the **Re-enter New Password** field.
9. Click **Submit**.
10. If your new password meets the given requirements, WAMS Profile Management displays a message confirming that your password was successfully changed.
 - a. Click **Logout** to exit.
- OR -
 - b. Click **Continue** to return to the *Profile Management* page.



The screenshot shows the WISCONSIN.GOV Profile Management page. At the top is the Wisconsin state outline logo and the text 'WISCONSIN.GOV' with links for 'Logout', 'Help', and 'FAQ'. Below the logo is the heading 'Profile Management' and a note '* Indicates Required Field'. The page is divided into two main sections: 'Profile Information' and 'Account Information'. The 'Profile Information' section contains fields for 'First Name' (Pat), 'Middle Initial' (empty), 'Last Name' (User), 'Suffix' (a dropdown menu with options like 'e.g., JR, SR, I, II, III'), and 'E-Mail' (patuser). The 'Account Information' section contains a note: 'Your User ID must be between 5-20 characters and CAN be a combination of letters and numbers. User IDs are case sensitive.' Below this note are fields for 'User ID' (patuser) and 'Password' (5 Change Password). At the bottom of the form is a 'Submit' button.



The screenshot shows the WISCONSIN.GOV Profile Management page after a password change. At the top is the Wisconsin state outline logo and the text 'WISCONSIN.GOV' with links for 'Logout', 'Help', and 'FAQ'. Below the logo is the heading 'Profile Management'. A message states: 'Your password has been changed.' Below the message is a 'Continue' button. At the bottom of the page is a link: 'For assistance send an e-mail to [Hello Wisconsin Support](#)'.



WisDOT: Create User Profile

The *Update Login Information* page opens the first time DOT users log in to CARS. Normally, CARS opens the *Dashboard* page. You can create a profile and then edit it later. Currently, you must simply select a primary region. Please select the region or bureau from which you are paid. It is recommended that you also enter a phone number.

1. Select the primary region or bureau for which you work in the **Regions** field.
2. Optional: Enter your work phone number in the **Phone Number** field.
3. Click **Next**. CARS opens your *Dashboard* page.

WisDOT: Update Login Information

CARS opens the *Update Login Information* page for returning CARS users who have not entered a phone number. A phone number is not required.

1. Optional: Enter your work phone number in the **Phone Number** field. If you choose not to enter a phone number, CARS will prompt you to enter one each time you log in.
2. Click **Next**. CARS opens your *Dashboard* page.

State of Wisconsin
Department of Transportation

ACPT

CARS - Contract Administration & Reporting System

AUSER Project, Contract or Master Contract: Search

Update Login Information

* Indicates required field

1 Regions: *
BPD

2 Phone Number
(608) 266-2915

3 Next

State of Wisconsin
Department of Transportation

ACPT

CARS - Contract Administration & Reporting System

AUSER Project, Contract or Master Contract: Search

Update Login Information

* Indicates required field

1 Phone Number

2 Next



Consultants: CARS Vendor Selection Page

Consultants who have access to more than one firm's records will see the *CARS Vendor Selection* page after logging in to CARS. Each firm name is a link to the user's dashboard for that firm.

- Click the link for the firm in which you are going to work.

WISCONSIN DEPARTMENT OF TRANSPORTATION
Doing Business ACPT
Home Log Off

CARS - Contract Administration & Reporting System

CARS Vendor Selection

Vendors

* Please select the vendor

- [BC Waterways](#)
- [BC Enterprises](#)
- [BC Landscaping](#)
- [BC Paving](#)

Direct questions to the [WisDOT Computer Help Desk](#) 1-800-362-3050 Monday, Jun 23, 2014 12:25:59 PM

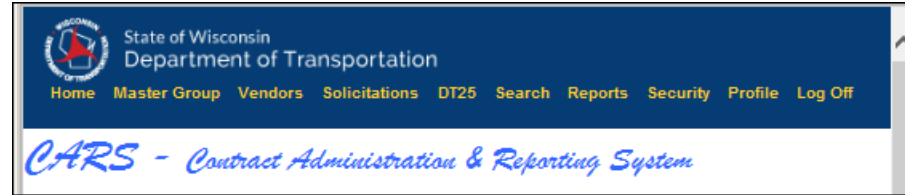


Navigation

Main Menu

The CARS main menu varies by your permissions. You will not necessarily have all of the commands that are described for each of the menu types. WisDOT users, Regional Administrators and Management Consultants will see WisDOT main menus. Consultants will see consultant main menus.

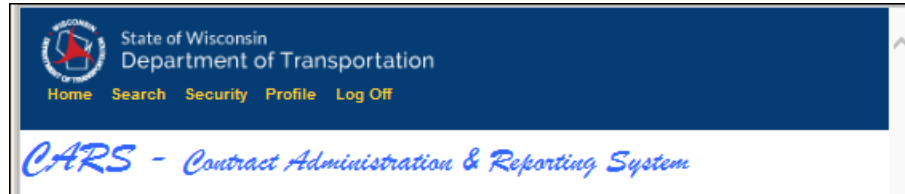
WisDOT Main Menu



Menu Item	Purpose	Menu Item	Purpose
Home	Returns to your <i>Dashboard</i> page from any page in CARS	Search	Lists tools for items that can be searched, such as contracts, vendors and invoices
Master Group	Administrator tools for adding and finding master groups	Reports	Links to the SAP Business Object reports
Vendors	Tools for finding and managing vendors	Security	Tools for assigning WisDOT user security access; visible only to Regional Administrators
Solicitations	Tool for finding solicitations	Profile	Opens the <i>User Profile</i> page for user information management
DT25	Tools for adding and finding DT25 records	Log Off	Logs the user off CARS



Consultant Main Menus



Menu Item	Purpose	Menu Item	Purpose
Home	Returns to your <i>Dashboard</i> page from any page in CARS	Profile	Opens the <i>User Profile</i> page
Search	Lists tools for items that can be searched, such as invoices	Log Off	Logs the user off CARS
Security	Visible only to Vendor Administrators for managing access		



Contract and Work Order Identifiers on Dashboards and in Security Lists

Contract identifiers may have multiple components that help you choose a specific contract when similarly named projects are listed on certain pages, such as dashboards or. The identifiers are displayed in a specific order and are separated by colons in the order:

Place	Identifier	Format	Example
1	State project ID	8 digits in 3 sets separated by hyphens	9999-99-99
2	Master contract number	“M” followed by 8 digits	M00000000
3	Work order number	Whole number	278
4	Contract number	10 digit number	1400006343
5	Approval date	MM/DD/CCYY	04/01/2012
6	Amendment Number (amendment subcontracts)	Whole number	21

Where one or more of the identifiers is not applicable or available, it is skipped in the result. The image below shows an example of contracts a security list. The place listed in the table above is shown on the top row, and a color is applied. The search results are marked in color by identifier type. Notice that project IDs are not always the first identifier shown.

1	2	3	4	5
5555-88-77	M55558877	1	1400006343	05/01/2014
5555-99-88	1400006344	05/01/2014		
7777-77-77	1400006311			
M55558877	1400006343			
1009-35-01	524120006	06/06/2012		

Prime contracts, subcontracts and amendment subcontracts may have all of the first five identifiers. There is an additional number on the end when a single prime contract or work order has multiple amendment subcontracts assigned to one subcontractor. The amendment subcontracts are listed in the amendment subconsultant’s security list only when the firm has a cost line on the amendment.

Note: Security administrators must assign security roles for every amendment subcontract to each appropriate user in order for invoice costs to be applied correctly. If your firm has a new approved amendment subcontract, you must update the security access before the funds can be properly applied to your invoice.



The images below show examples of amendment subcontracts assigned to the same subcontractor as listed on both the dashboard and on the *Edit/New Amendment Subcontract* page available to security administrators. Colors are applied to the parts of the identifiers for emphasis.

Amendment SubContracts

Project ID: Prime Vendor:

61 items found, displaying 31 to 40. [\[First/Prev\]](#) [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#) [\[Next/Last\]](#)

Contract	Type
1200-01-04 : 1024101200 : 04/26/2011 : 1	Regular
1300-03-04 : M06953071 : 3 : 605103071 : 08/27/2010 : 1	Work Order

Dashboard

Manage Amendment SubContracts

Vendor Name:

Staff Member:

Note: Selecting "All Active Contracts" will assign below selected roles in all active contracts to this staff member.

Select All Active Contracts

Amendment SubContracts *

1200-01-04 : 1024101200 : 04/26/2011 : 1

1300-03-04 : M06953071 : 3 : 605103071 : 08/27/2010 : 1

Edit/New Amendment Subcontract Page

Amendment SubContracts

Project ID: Prime Vendor:

11 items found, displaying 1 to 10. [\[First/Prev\]](#) [1](#), [2](#) [\[Next/Last\]](#)

Contract	Type
0000-00-11 : 1400016329 : 11/01/2015 : 2	Regular
0000-00-11 : 1400016329 : 11/01/2015 : 3	Regular

Dashboard

Manage Amendment SubContracts

Vendor Name:

Staff Member:

Note: Selecting "All Active Contracts" will assign below selected roles in all active contracts to this staff member.

Select All Active Contracts

Amendment SubContracts *

0000-00-11 : 1400016329 : 11/01/2015 : 2

0000-00-11 : 1400016329 : 11/01/2015 : 3

Edit/New Amendment Subcontract Page



Search Tools

Search Field

CARS provides a search field to locate a specific project, contract or master contract, currently for prime contracts only. The search field **Prime Project, Contract or Master Contract** is in the upper right-hand corner of most CARS pages. If CARS finds more than one match, the system displays a table of search results. If you have the appropriate access to the record, search results table will contain links to the contracts and invoices. If CARS finds only one match and you have appropriate security role, CARS opens the appropriate contract page.

Prime Project, Contract or Master Contract:

Note: Search terms for projects and contracts must include the entire project or contract ID. “Wild card” characters such as the asterisk (*) are not supported. Hyphens are not needed in project IDs.

Search Menus

Use the search menu functions to locate records quickly. Available search functions include contracts, invoices and vendors (DOT only).



WisDOT
Contracts
Vendors
Invoices

Consultant
Contracts
Invoices



If CARS finds more than one match, the system displays a table of search results. If CARS finds only one match, the system opens the appropriate contract or project page. If you have appropriate access to the record, search results table will contain links to the contracts and invoices. If CARS finds only one match and you have appropriate security role, CARS opens the appropriate contract page.

Search results are limited to the first 100 matching records in order to maintain performance standards. If the record you need does not appear in the search results, review your search criteria. You may also need to adjust or add to the search criteria in order to limit the results.



WisDOT: Search Menu Functions

WisDOT users have 3 search functions:

- Contracts (page 26)
- Vendors (page 31)
- Invoice (page 31)

To complete any search function, enter the search criteria as described in the sections below and click **Search**.

No fields are required; leave any field blank or at “-Select-” to ignore that parameter.

Search Contracts

Path: **Search** → **Contracts**

- **Project ID:** Uses the autocomplete feature to list the first 10 matching project IDs. As you type more digits, CARS updates the list of matching projects.
- **Vendor Type:** Select the **Prime**, **Sub** or **All** buttons. *Prime* is the default.
- **Vendor:** Uses the autocomplete feature to list matching consultant firm names. As you type more characters, CARS updates the list of matching consultants.
- **Status:** Select the contract status. The selection choices are:
 - Active
 - Cancelled
 - Complete
 - Selection
 - Solicitation

Search Contracts

Contract Criteria Search

Project ID	Contract Number
<input type="text"/>	<input type="text"/>
Vendor Type: <input checked="" type="radio"/> Prime <input type="radio"/> Sub <input type="radio"/> All	Date Type <input type="text"/> From Date: <input type="text"/> To Date: <input type="text"/>
Vendor <input type="text"/>	<input type="text"/> -Select-
Status <input type="text"/> -Select-	Master Contract Id <input type="text"/>
Type <input type="text"/> -Select-	Work Order: <input type="text"/>
Highway <input type="text"/>	Program Code <input type="text"/> -Select-
Contract Function <input type="text"/> -Select-	Purchase Order <input type="text"/>
County <input type="text"/> -Select-	Selection Type <input type="text"/> -Select-
Region/Bureau <input type="text"/> -Select-	Solicitation Id <input type="text"/>
	Project Manager <input type="text"/>
	Limits <input type="text"/>
	Consultant Contact: <input type="text"/>

Master Contract Group Search

Master Group (Start Date, Solicitation, Master Group Type) * -Select-



WisDOT: Search Contracts - continued

- **Type:** Select the contract type as *Master* or *Regular*. “Master” returns only master contract records.
- **Highway:** Enter all or part of the highway name. You may use wild cards (*) as character placeholders in this search field.
- **Contract Function:** Select from over 100 function designations
- **County:** Select the county name from the list. Multi-county projects use “Various” in the **County** field.
- **Region/Bureau:** Select the WisDOT region or bureau responsible for the contract by its abbreviation.
- **Contract Number:** Enter the exact CARS contract number.
- **Master Contract Id:** Enter the exact master contract number formatted as “M” followed by eight digits. Do not use hyphens. Work order number is not required.
- **Work Order:** Enter the exact work order number. Master Contract ID is required to search by work order number.
- **Purchase Order:** Enter all or part of the PO number. You may use wild cards (*) as character placeholders in this search field.
- **Solicitation Id:** Uses the autocomplete feature to list matching solicitation IDs. As you type more characters, CARS updates the list of matching solicitation IDs.

Search Contracts

Contract Criteria Search

Project ID	<input type="text"/>	Contract Number	<input type="text"/>
Vendor Type:	<input checked="" type="radio"/> Prime <input type="radio"/> Sub <input type="radio"/> All	Date Type	<input type="text"/> From Date: <input type="text"/> To Date: <input type="text"/>
Vendor	<input type="text"/>	<input type="text"/> -Select-	
Status	<input type="text"/> -Select-	Master Contract Id	<input type="text"/>
Type	<input type="text"/> -Select-	Work Order:	<input type="text"/>
Highway	<input type="text"/>	Program Code	<input type="text"/> -Select-
Contract Function	<input type="text"/> -Select-	Purchase Order	<input type="text"/>
County	<input type="text"/> -Select-	Selection Type	<input type="text"/> -Select-
Region/Bureau	<input type="text"/> -Select-	Solicitation Id	<input type="text"/>
		Project Manager	<input type="text"/>
		Limits	<input type="text"/>
		Consultant Contact:	<input type="text"/>

Master Contract Group Search

Master Group (Start Date, Solicitation, Master Group Type) *

 -Select-



WisDOT: Search Contracts - continued

- **Project Manager:** Uses the autocomplete feature to list matching project manager names, last name first. As you type more characters, CARS updates the list of matching names.
- **Limits:** Enter all or part of the project limits. You may use wild cards (*) as character placeholders in this search field. Special characters such as hyphens, ampersands and slashes are not allowed.
- **Consultant Contact:** Uses the autocomplete feature to list matching consultant contact names, last name first. As you type more characters, CARS updates the list of matching names.
- **Date Type:** This field is one of three fields used to search contracts by date range. Select the date type in this field:
 - Selection Date
 - Submitted Date
 - Approved Date
 - Anticipated Auth(orized) Date
 - Authorized Date
 - Original Completion Date
 - Current Completion Date
 - Cancelled Date

Search Contracts

Contract Criteria Search

Project ID	<input type="text"/>	Contract Number	<input type="text"/>
Vendor Type:	<input checked="" type="radio"/> Prime <input type="radio"/> Sub <input type="radio"/> All	Date Type	<input type="text"/> From Date: <input type="text"/> To Date: <input type="text"/>
Vendor	<input type="text"/>	Master Contract Id	<input type="text"/>
Status	<input type="text"/>	Work Order:	<input type="text"/>
Type	<input type="text"/>	Program Code	<input type="text"/>
Highway	<input type="text"/>	Purchase Order	<input type="text"/>
Contract Function	<input type="text"/>	Selection Type	<input type="text"/>
County	<input type="text"/>	Solicitation Id	<input type="text"/>
Region/Bureau	<input type="text"/>	Project Manager	<input type="text"/>
		Limits	<input type="text"/>
		Consultant Contact:	<input type="text"/>

Master Contract Group Search

Master Group (Start Date, Solicitation, Master Group Type) *



WisDOT: Search Contracts - continued

- From Date:** This field is one of three fields used to search contracts by date range. Enter the earliest or start date in this field. A calendar opens to help you select the date.
- To Date:** This field is one of three fields used to search contracts by date range. Enter the latest or end date in this field. A calendar opens to help you select the date.
- Program Code:** Enter the [financial program code](#).
- Selection Type:** Select the type of contract:
 - Interagency Agreement
 - Local Design
 - Municipal Engineering
 - Request for Proposal
 - Research Program
 - Small Purchase
 - Sole Source
 - Mentor Protégé
- Master Contract Group Search:** Select a solicitation ID from the list. Solicitation IDs consist of the master contract start date, solicitation number (a combination of bureau abbreviation, solicitation number and solicitation date), and the job description for the solicitation. Example: 08/01/201/, BOS02-03/05/2014, Sign Structure Inspection

Search Contracts

Contract Criteria Search

<p>Project ID <input type="text"/></p> <p>Vendor Type: <input checked="" type="radio"/> Prime <input type="radio"/> Sub <input type="radio"/> All</p> <p>Vendor <input type="text"/></p> <p>Status <input type="text" value="-Select-"/></p> <p>Type <input type="text" value="-Select-"/></p> <p>Highway <input type="text"/></p> <p>Contract Function <input type="text" value="-Select-"/></p> <p>County <input type="text" value="-Select-"/></p> <p>Region/Bureau <input type="text" value="-Select-"/></p>	<p>Contract Number <input type="text"/></p> <p>Date Type <input type="text" value="-Select-"/></p> <p>From Date: <input type="text"/> To Date: <input type="text"/></p> <p>Master Contract Id <input type="text"/></p> <p>Work Order: <input type="text"/></p> <p>Program Code <input type="text" value="-Select-"/></p> <p>Purchase Order <input type="text"/></p> <p>Selection Type <input type="text" value="-Select-"/></p> <p>Solicitation Id <input type="text"/></p> <p>Project Manager <input type="text"/></p> <p>Limits <input type="text"/></p> <p>Consultant Contact: <input type="text"/></p>
--	--

Master Contract Group Search

Master Group (Start Date, Solicitation, Master Group Type) *



**WisDOT: Search Contracts
- continued**

When your search is completed, CARS displays the results in grid format. Click the link in the **Project Id** column to access the contract. Active links in the **Master Contract** column open master contracts.

Advanced Search Results

← Back To Contract Search Print Page

Contract Search Results

9 items found, displaying all items. 1

Project Id	Type	Master Contract	Work Order	Prime Vendor	Status	Sol Date	Auth Date	Purchase Order	Function	Hwy	Region/ Bureau	County
	Master	M22222222		Able Engineering	Active	04/30/2014	2016/04		In-Plant Inspection Services	10	BTS	Various
7899-87-78	Regular			Able Engineering	Active	2015/04	2015/09		Training Services	7	BPD	Dane
5656-56-56	Regular			Able Engineering	Cancelled				Environmental Documentation	3	NW	Dunn
4141-41-41	Regular			Able Engineering	Active	2015/04	2015/06	5555555	Construction Services	1	NW	Pepin
9999-99-97	Regular			Able Engineering	Active		2016/04		Agency Coordination	10	NE	Calumet
9999-99-90	Work Order	M22222222	1	Able Engineering	Active		2016/04		In-Plant Inspection Services	10	NE	Calumet
9999-99-89	Work Order	M22222222	2	Able Engineering	Active		2016/04		In-Plant Inspection Services	10	NE	Calumet
9999-99-96	Regular			Able Engineering	Active	2011/01	2016/04		Biological	10	NE	Calumet
9998-88-88	Regular			Able Engineering	Active		2016/04		Analytical Services	10	NE	Calumet

9 items found, displaying all items. 1

← Back To Contract Search Print Page



Search Vendors

Use the Vendor search functions to locate vendor information. When you click **Search**, CARS opens the *View Vendor* page with the firm's information loaded.

Path: **Search** → **Vendors**

- **Status:** Select "Active" or "Inactive"
- **Vendor:** Uses the autocomplete feature to list matching vendor names. As you type more characters, CARS updates the list of matching names.
- **DBE:** Select "Yes" or "No" to indicate the firms' current Disadvantaged Business Enterprise status.

The screenshot shows the 'Search Vendors' form. It has a title 'Search Vendors' and a section 'Vendor Information'. Inside this section, there are three fields: 'Status' with a dropdown menu currently showing 'Active', 'Vendor' with a text input field, and 'DBE' with a dropdown menu currently showing '-Select-'. At the bottom of the form are two buttons: 'Search' and 'Clear'.

Search Invoices

Path: **Search** → **Invoice**

- **Prime Vendor:** Uses the autocomplete feature to list matching prime consultant firm names. As you type more characters, CARS updates the list of matching names.
- **Sub Vendor:** Uses the autocomplete feature to list matching sub consultant firm names. As you type more characters, CARS updates the list of matching names.
- **Sub Vendor Type:** Select the **Subcontract** or **Amendment Subcontract** buttons. *Subcontract* is the default.

The screenshot shows the 'Search Invoices' form. It has a title 'Search Invoices' and a section 'Invoice Information'. Inside this section, there are several fields: 'Prime Vendor' (text input), 'Sub Vendor' (text input), 'Sub Vendor Type' (radio buttons for 'Subcontract' and 'Amendment', with 'Subcontract' selected), 'Project ID' (text input), 'DOT Invoice ID' (text input), and 'Consultant Invoice Number' (text input). On the right side, there are 'Invoice Status' (dropdown menu showing '-Select-') and 'Submitted Date' (two text input fields labeled 'From:' and 'To:'). At the bottom of the form are two buttons: 'Search' and 'Clear'.



Search Invoices - continued

- **Project ID:** Uses the autocomplete feature to list the first 10 matching project IDs. As you type more digits, CARS updates the list of matching projects
- **DOT Invoice ID:** Enter the unique invoice identifier assigned by CARS. CARS displays this numeric value in the **Invoice ID** field in the **Contract Invoice Information** section for each invoice.
- **Consultant Invoice Number:** Enter the invoice identifier assigned to the invoice by the consultant. This value is typically the tracking number from the firm's financial system.
- **Invoice Status:** Select the current invoice status. The selection choices are:
 - Accepted by Higher Tier
 - Approved
 - Approved - Sent to Acct Sys
 - Approved - Zero or Negative invoice
 - Checked Out for Payment

Search Invoices

Invoice Information

Prime Vendor	Invoice Status: <input type="text" value="-Select-"/>
Sub Vendor	Submitted Date:
Sub Vendor Type: <input checked="" type="radio"/> Subcontract <input type="radio"/> Amendment	From: <input type="text"/> To: <input type="text"/>
Project ID	
DOT Invoice ID	
Consultant Invoice Number	

- Draft
- Draft for Subcontract
- Included in Higher Tier
- Included in Invoice
- Paid
- Paid Special
- Rejected
- Rejected by Higher Tier
- Reviewed
- Sent Back to Approver
- Submitted
- Submitted to Higher Tier



Search Invoices - continued

- Submitted Date From:**
 This field is one of two fields used to search contracts by submitted date range. Enter the earliest or start date in this field. A calendar opens to help you select the date.
- Submitted Date To:**
 This field is one of two fields used to search contracts by submitted date range. Enter the latest or end date in this field. A calendar opens to help you select the date.

Search Invoices

Invoice Information

Prime Vendor:

Sub Vendor:

Sub Vendor Type: Subcontract Amendment

Project ID:

DOT Invoice ID:

Consultant Invoice Number:

Invoice Status:

Submitted Date: From: To:

When your search is completed, CARS displays the results in grid format. Click the link in the **Project Id/Master/WO #** column to access the invoice. Links are active only for invoices to which you have security access.

[Back To Invoice Search](#) [Print Page](#)

Invoice Search Results
45 items found, displaying all items. 1

Project Id /Master /WO #	Contract Number	Vendor Name	Contact Name	Project Manager	Status	Consultant Invoice#	Created Date	Invoice Period
2704-01-03 /MD6979999 /1	1400011684	Acme, Inc.	Dan Meinen	Wisner,Fred	Rejected	105	03/01/2015	02/01/2015 to 02/28/2015
1175-19-30	1400011683	Acme, Inc.	Dan Meinen	Bremser,Sharon	Rejected	104	03/01/2015	02/01/2015 to 02/28/2015
1175-19-30	1400011683	Beta Max, Inc.	Dan Beta	Bremser,Sharon	Included in Invoice	104S	03/01/2015	02/01/2015 to 02/28/2015
0000-00-00	1400016763	Beta Max, Inc.	Dan Meinen		Paid	CM_Beta	02/28/2016	02/01/2016 to 02/02/2016
1175-19-30	1400011683	Beta Max, Inc.	Dan Meinen	Bremser,Sharon	Submitted to Higher Tier	Betamax_Invoice	03/22/2015	03/01/2015 to 03/13/2015
1060-33-07	1400011666	Beta Max, Inc.	Dan Meinen	Bremser,Sharon	Submitted to Higher Tier	BetalInvoice2	03/22/2015	03/01/2015 to 03/12/2015
1060-33-07	1400011666	Acme, Inc.	Dan Meinen	Bremser,Sharon	Rejected	103	03/01/2015	02/01/2015 to 03/01/2015

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Consultants: Search Menu Functions

Consultant users have 2 search functions:

- Contracts (page 34)
- Invoice (page 38)

To complete any search function, enter the search criteria as described in the sections below and click **Search**.

No fields are required; leave any field blank or at “-Select-” to ignore that parameter.

Search Contracts

Path: **Search** → **Contracts**

- **Project ID:** Uses the autocomplete feature to list matching project IDs. As you type more digits, CARS updates the list of matching projects.
- **Vendor Type:** Select **Prime**, **Sub** or **All**. *Prime* is the default.
- **Vendor:** Uses the autocomplete feature to list matching consultants. As you type more characters, CARS updates the list of matching consultants.
- **Status:** Select from:
 - Active
 - Cancelled
 - Complete
 - Selection
 - Solicitation
- **Type:** Select the contract type as *Master* or *Regular*. “Master” returns only master contract records.

Search Contracts

Contract Criteria Search

Project ID <input type="text"/>	Contract Number <input type="text"/>
Vendor Type: <input checked="" type="radio"/> Prime <input type="radio"/> Sub <input type="radio"/> All	Date Type -Select- <input type="text"/>
Vendor <input type="text"/>	From Date: <input type="text"/>
Status -Select- <input type="text"/>	To Date: <input type="text"/>
Type -Select- <input type="text"/>	Master Contract Id <input type="text"/>
Highway <input type="text"/>	Work Order: <input type="text"/>
Contract Function -Select- <input type="text"/>	Purchase Order <input type="text"/>
County -Select- <input type="text"/>	Solicitation Id <input type="text"/>
Region/Bureau -Select- <input type="text"/>	Project Manager <input type="text"/>
	Limits <input type="text"/>
	Consultant Contact: <input type="text"/>



Search Contracts - continued

- **Highway:** Enter all or part of the highway name. You may use wild cards (*) as character placeholders in this search field.
- **Contract Function:** Select from over 100 function designations
- **County:** Select the county name from the list. Multi-county projects use “Various” in the **County** field.
- **Region/Bureau:** Select the WisDOT region or bureau abbreviation
- **Contract Number:** Enter the exact CARS contract number.
- **Master Contract Id:** Enter the exact master contract number formatted as “M” followed by eight digits. Do not use hyphens. Work order number is not required.
- **Work Order:** Enter the exact work order number. Master Contract ID is required to search by work order number.
- **Purchase Order:** Enter all or part of the PO number. You may use wild cards (*) as character placeholders in this search field.
- **Solicitation Id:** Uses the autocomplete feature to list matching solicitation IDs. As you type more characters, CARS updates the list of matching solicitation IDs.

Search Contracts

Contract Criteria Search

Project ID <input type="text"/>	Contract Number <input type="text"/>	From Date: <input type="text"/>	To Date: <input type="text"/>
Vendor Type: <input checked="" type="radio"/> Prime <input type="radio"/> Sub <input type="radio"/> All	Date Type [-Select-] ▼		
Vendor <input type="text"/>	Master Contract Id <input type="text"/>		
Status [-Select-] ▼	Work Order: <input type="text"/>		
Type [-Select-] ▼	Purchase Order <input type="text"/>		
Highway <input type="text"/>	Solicitation Id <input type="text"/>		
Contract Function [-Select-] ▼	Project Manager <input type="text"/>		
County [-Select-] ▼	Limits <input type="text"/>		
Region/Bureau [-Select-] ▼	Consultant Contact: <input type="text"/>		



Search Contracts - continued

- **Project Manager:** Uses the autocomplete feature to list matching project manager names, last name first. As you type more characters, CARS updates the list of matching names.
- **Limits:** Enter all or part of the project limits. You may use wild cards (*) as character placeholders in this search field. Special characters such as hyphens, ampersands and slashes are not allowed.
- **Consultant Contact:** Uses the autocomplete feature to list matching consultant contact names, last name first. As you type more characters, CARS updates the list of matching names.

When your search is completed, CARS displays the results in grid format. Click the link in the **Project Id** column to access the contract.

Search Contracts

Contract Criteria Search

Project ID <input type="text"/>	Contract Number <input type="text"/>
Vendor Type: <input checked="" type="radio"/> Prime <input type="radio"/> Sub <input type="radio"/> All	Date Type [-Select-] <input type="text"/>
Vendor <input type="text"/>	From Date: <input type="text"/>
Status [-Select-] <input type="text"/>	To Date: <input type="text"/>
Type [-Select-] <input type="text"/>	Master Contract Id <input type="text"/>
Highway <input type="text"/>	Work Order: <input type="text"/>
Contract Function [-Select-] <input type="text"/>	Purchase Order <input type="text"/>
County [-Select-] <input type="text"/>	Solicitation Id <input type="text"/>
Region/Bureau [-Select-] <input type="text"/>	Project Manager <input type="text"/>
	Limits <input type="text"/>
	Consultant Contact: <input type="text"/>

Advanced Search Results

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Contract Search Results

100 items found, displaying 76 to 100. [\[First/Prev\]](#) [1](#) [2](#) [3](#) [4](#) [\[Next/Last\]](#)

Project Id	Type	Master Contract	Work Order	Prime Vendor	Status	Sol Date	Auth Date	Purchase Order	Function	Hwy	Region/Bureau	County
0000-00-18	Regular			Osage & Co.	Active	2016/03	2016/01		Construction Services	980	BPD	Price
0000-00-19	Regular			Osage & Co.	Active	2016/03	2016/01		Construction Services	89	BHO	Kewaunee
0330-20-16	Work Order	M123456789	1	Osage & Co.	Active		2016/03		Local Construction	85	NC	Adams
0331-20-16	Regular			Osage & Co.	Complete	2015/05		3534038	Administrative Assistance	56	NW	Bayfield

100 items found, displaying 76 to 100. [\[First/Prev\]](#) [1](#) [2](#) [3](#) [4](#) [\[Next/Last\]](#)

[Back To Contract Search](#) [Print Page](#)



Search Contracts - continued

- **Date Type:** This field is one of three fields used to search contracts by date range. Select the date type in this field:
 - Selection Date
 - Submitted Date
 - Approved Date
 - Anticipated Auth(orized) Date
 - Authorized Date
 - Original Completion Date
 - Current Completion Date
 - Cancelled Date
- **From Date:** This field is one of three fields used to search contracts by date range. Enter the earliest or start date in this field. A calendar opens to help you select the date.
- **To Date:** This field is one of three fields used to search contracts by date range. Enter the latest or end date in this field. A calendar opens to help you select the date.

Search Contracts

Contract Criteria Search

Project ID <input type="text"/>	Contract Number <input type="text"/>	From Date: <input type="text"/>	To Date: <input type="text"/>
Vendor Type: <input checked="" type="radio"/> Prime <input type="radio"/> Sub <input type="radio"/> All	Date Type -Select- <input type="text"/>		
Vendor <input type="text"/>	Master Contract Id <input type="text"/>		
Status -Select- <input type="text"/>	Work Order: <input type="text"/>		
Type -Select- <input type="text"/>	Purchase Order <input type="text"/>		
Highway <input type="text"/>	Solicitation Id <input type="text"/>		
Contract Function -Select- <input type="text"/>	Project Manager <input type="text"/>		
County -Select- <input type="text"/>	Limits <input type="text"/>		
Region/Bureau -Select- <input type="text"/>	Consultant Contact: <input type="text"/>		



Search Invoices

Path: **Search** → **Invoice**

- **Prime Vendor:** Uses the autocomplete feature to list matching prime consultant firm names. As you type more characters, CARS updates the list of matching names.
- **Sub Vendor:** Uses the autocomplete feature to list matching sub consultant firm names. As you type more characters, CARS updates the list of matching names.
- **Sub Vendor Type:** Select the **Subcontract** or **Amendment Subcontract** buttons. *Subcontract* is the default.
- **Project ID:** Uses the autocomplete feature to list the first 10 matching project IDs. As you type more digits, CARS updates the list of matching projects.
- **DOT Invoice ID:** Enter the unique invoice identifier assigned by CARS. CARS displays this numeric value in the **Invoice ID** field in the **Contract Invoice Information** section for each invoice.
- **Consultant Invoice Number:** Enter the invoice identifier assigned to the invoice by the consultant. This value is typically the tracking number from their financial system.

Search Invoices

Invoice Information

Prime Vendor	Invoice Status:
<input type="text"/>	<input type="text" value="-Select-"/>
Sub Vendor	Submitted Date:
<input type="text"/>	From: <input type="text"/> To: <input type="text"/>
Sub Vendor Type: <input checked="" type="radio"/> Subcontract <input type="radio"/> Amendment Subcontract	
Project ID	<input type="text"/>
DOT Invoice ID	<input type="text"/>
Consultant Invoice Number	<input type="text"/>



Search Invoice - continued

- **Invoice Status:** Select the current invoice status. The selection choices are:
 - Accepted by Higher Tier
 - Approved
 - Approved - Sent to Acct Sys
 - Approved - Zero or Negative invoice
 - Checked out for Payment
 - Draft
 - Draft for subcontract
 - Included in Higher Tier
 - Included in Invoice
 - Paid
 - Paid Special
 - Rejected
 - Rejected by Higher Tier
 - Reviewed
 - Sent Back to Approver
 - Submitted
 - Submitted to Higher Tier
- **Submitted Date From:** This field is one of two fields used to search contracts by submitted date range. Enter the earliest or start date in this field. A calendar opens to help you select the date.
- **Submitted Date To:** This field is one of two fields used to search contracts by submitted date range. Enter the latest or end date in this field. A calendar opens to help you select the date.

Search Invoices

Invoice Information

Prime Vendor _____	Invoice Status: -Select- ▾
Sub Vendor _____	Submitted Date:
Sub Vendor Type: <input checked="" type="radio"/> Subcontract <input type="radio"/> Amendment Subcontract	From: _____ To: _____
Project ID _____	
DOT Invoice ID _____	
Consultant Invoice Number _____	



Search Invoice - continued



When your search is completed, CARS displays the results in grid format. Click the link in the **Project Id/Master/WO #** column to access the invoice. Links are active only for invoices to which you have security access.

Project Id /Master /WO #	Contract Number	Vendor Name	Contact Name	Project Manager	Status	Consultant Invoice#	Created Date	Invoice Period
1000-00-67	109130026	Osage & Co.	Prime 2	Zimmer,Andrew	Paid	Prime 2	11/13/2015	11/02/2015 to 11/15/2015
4500-00-01	1400012143	Osage & Co.	Prime 2	Meinen,Dan	Paid	prime 2	09/14/2015	09/01/2015 to 09/28/2015
3464-57-97	1400012243	Osage & Co.	prime 1	Zimmer,Andrew	Draft	prime 1	09/09/2015	09/01/2015 to 09/22/2015
0909-20-15	1400012244	Osage & Co.	Axel 1	Meinen,Dan	Submitted to Higher Tier	Axel 1	09/09/2015	09/01/2015 to 09/07/2015
0098-10-03 /M00981001 /3	1400011103	Osage & Co.	wyat	Tyler,Dan	Included in Invoice	Able amd sub 2	08/03/2015	07/01/2015 to 08/01/2015



Buttons

Back to Top Button

Pages in CARS can be very long. The **Back to Top** button  floats in the lower right-hand corner of every screen when you scroll down from the top of the page. When you click , CARS automatically scrolls to the top of the current page.

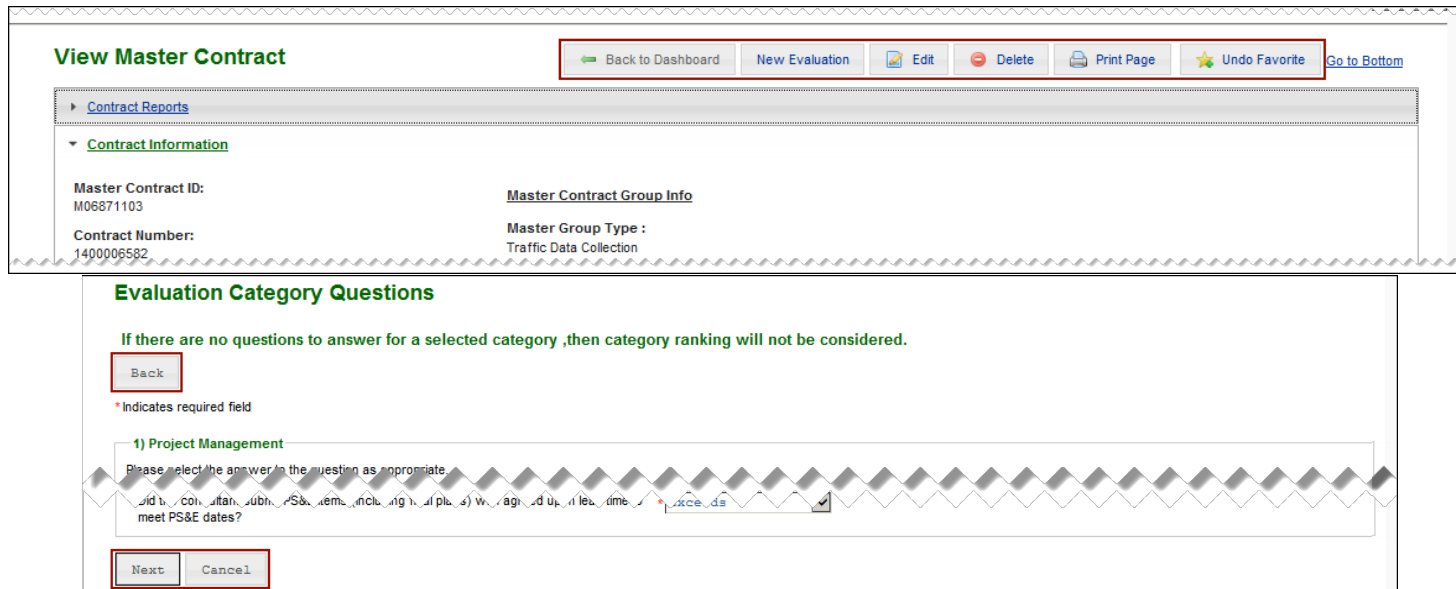
Go to Bottom Link

Some pages that are typically long have a **Go to Bottom** link at the top of the page near the navigation and command buttons. An example is the *View Contract* page. Click this link to go to the bottom of the page.



Page Navigation and Command Buttons

Pages often have buttons used to navigate or to perform functions within CARS. They are located at the top or bottom of the page, and the buttons you can see vary by your permissions, the type of record, and the status of the record. Always use the CARS navigation buttons, such as **Back to Dashboard**, **Back** and **Next**, instead of the Internet Explorer buttons for similar functions.




Data Entry Tools

Autocomplete

Autocomplete is an incremental search feature available in some fields where the content is predictable or structured. When you type a minimum of 2 characters, CARS lists all possible values that begin with those two characters. As you type more characters, CARS shortens the list to match. Examples of these fields include **Project ID** and **Vendor**. This feature is sometimes called “type-ahead”. You must click the value in the list provided to enter it in the field.

Positional Search

Fields in CARS have a down arrow  on the right side usually have a defined set of possible values. These fields read “-Select-” before you enter data. You can quickly enter data by typing the first two or more characters of the term you need. CARS will display the first matching item on the list. If you stop typing before CARS finds the match you want, simply start to type the characters again, but add another. For example, suppose you want to enter “Portage” in a **County** drop-down field. Typing “PO” selects “Polk”. If you pause typing and enter “R”, CARS changes the county to “Racine” because that is the first county that begins with “R”. Typing “POR” without pausing changes the selected county to “Portage”.

Note: You can also use the UP and DOWN keys on your keyboard to move up and down drop-down fields. For example, type “GRE” in the **County** field (CARS displays “Green”), and then press the DOWN key. CARS displays “Green Lake”.



WisDOT: Dashboards

The *Dashboard* page normally opens when you log in to CARS. Click **Home** on the main menu on any page to return to the *Dashboard* page.

WisDOT: Dashboard Elements

1. The main menu contains the command menus as described on page 21. The menus you see depend on the roles you have. For example, the **Security** command is visible only to persons who have the Regional Administrator role.
2. Your user ID appears in the heading at the top of the page. It identifies the current user.
3. Use the search tools (see page 25) to locate a specific prime project, contract or master contract.
4. There are four sections on the dashboard:
 - **Evaluations** shows contract and work order evaluations that are in “PM Created” (draft) or “Consultant Reviewed” (returned by consultant firm) status. See WisDOT: Dashboard Alerts on page 45 for more details.
 - **Invoices** shows invoices from consultants. See WisDOT: Dashboard Alerts on page 45 for more details.
 - **Favorite Contracts** shows contracts you have designated as favorites so they appear on your *Dashboard* page for quick access.
 - **User Notes** are for your use as reminders or notes.

State of Wisconsin
Department of Transportation

Home Master Group Vendors Solicitations DT25 Search Reports Security Profile Log Off 1

CARS - Contract Administration & Reporting System

AUSER 2 Project, Contract or Master Contract: Search

Evaluations

One item found. 1

Seq No	Evaluator Name	Contract / Master	Level / Project Id /WO #	Processing Status	Consultant Reviewed Date	Days since Reviewed	Evaluation Period	Type	Function	Full Scope
1	All User	1400008170	0098-00-05	PM Created			03/03/2015 to 03/31/2015	Final Evaluation	Design	Yes

One item found. 1

Invoices

6 items found, displaying all items. 1

Project Id /Master /WO #	Type	Prime Vendor	Contact Name	Project Manager	Status	Consultant Invoice#	Days Since Submitted	Submitted Date	Invoice Period
0098-00-02		Able Engineering	Lane		Submitted	Able-009802	14	04/15/2015	02/01/2015 to 02/28/2015
0874-00-03 /M05410000 /3		Osage & Co.	Sara	JC Lane	Submitted	OS-SR-3-1	6	04/23/2015	03/01/2015 to 03/31/2015
0874-00-04 /M05410000 /4		Osage & Co.	Sara	JC Lane	Submitted	OS-AC-4-1	6	04/23/2015	03/01/2015 to 03/31/2015

3 items found, displaying all items. 1

Favorite Contracts

No items found. 1

Project Id	Limits	Type	Master Contract	Work Order	Status	Auth Date	Prime Vendor	Function/Master Type	Hwy	Region	County
0098-10-01	non-hwy	Regular			Active	2015/04	Axel Construction	Pavement	non-hwy	BPD	Various

User Notes

- Call Bonnie for new project number 6-5555



WisDOT: Dashboards - continued

The *Dashboard* page normally opens when you log in to CARS. Click **Home** on the main menu on any page to return to the *Dashboard* page.

WisDOT: Dashboard Elements

- CARS provides tools to sort lists. The heading rows of columns you can sort contain the title as a blue links and a double arrow. Click the heading row once to sort in ascending order (A to Z). Click again to reverse the order (Z to A). The double arrow changes to a single arrow to indicate the sort order you chose.
- Identifiers such as contract IDs serve as links to specific records.

The screenshot shows the CARS (Contract Administration & Reporting System) dashboard for user AUUSER. The interface includes a navigation menu, a search bar, and several data tables. Red callouts are used to highlight specific features:

- 1:** The 'Log Off' link in the top navigation menu.
- 2:** The user name 'AUUSER' in the top left.
- 3:** The search bar containing the text 'Project, Contract or Master Contract'.
- 4:** The 'Evaluations' section header.
- 5:** The 'Project Manager' column header in the 'Invoices' table.
- 6:** A contract ID link '0874-00-03/M05410000/3' in the 'Invoices' table.

Evaluations Table:

Seq No	Evaluator Name	Contract / Master	Level /Project Id /WO #	Processing Status	Consultant Reviewed Date	Days since Reviewed	Evaluation Period	Type	Function	Full Scope
1	All User	1400008170	0098-00-05	PM Created			03/03/2015 to 03/31/2015	Final Evaluation	Design	Yes

Invoices Table:

Project Id /Master /WO #	Type	Prime Vendor	Contact Name	Project Manager	Status	Consultant Invoice#	Days Since Submitted	Submitted Date	Invoice Period
0098-00-02		Able Engineering	Lane		Submitted	Able-009802	14	04/15/2015	02/01/2015 to 02/28/2015
0874-00-03/M05410000/3		Osage & Co.	Sara	JC Lane	Submitted	OS-SR-3-1	6	04/23/2015	03/01/2015 to 03/31/2015
0874-00-04/M05410000/4		Osage & Co.	Sara	JC Lane	Submitted	OS-AC-4-1	6	04/23/2015	03/01/2015 to 03/31/2015

Favorite Contracts Table:

Project Id	Limits	Type	Master Contract	Work Order	Status	Auth Date	Prime Vendor	Function/Master Type	Hwy	Region	County
0098-10-01	non-hwy	Regular			Active	2015/04	Axel Construction	Pavement	non-hwy	BPD	Various

User Notes:

- Call Bonnie for new project number 6-5555



WisDOT: Dashboard Alerts

The CARS dashboard alerts you to evaluations and invoices that have been on the dashboard for extended periods by highlighting them in color. If an invoice or evaluation assigned to you has had not status change in the last 10 days, that row is highlighted yellow. If the status has not changed in 20 days or more, the row is highlighted in red. These color changes coincide with email reminders that are sent to users who have the primary notification role at 10 days and both primary and secondary notification roles at 20 days or more.

AUSER Project, Contract or Master Contract:

▸ [Evaluations](#)

▾ [Invoices](#)

6 items found, displaying all items. 1

Project Id /Master /WO #	Type	Prime Vendor	Contact Name	Project Manager	Status	Consultant Invoice#	Days Since Submitted	Submitted Date	Invoice Period
0098-00-05		Able Engineering	Able		Submitted	Ab98005	39	03/19/2015	02/02/2015 to 03/13/2015
0098-00-02		Able Engineering	Lane		Submitted	Able-009802	12	04/15/2015	02/01/2015 to 02/28/2015
0874-00-01 /M05410000 /1		Osage & Co.	Sara	JC Lane	Submitted	OS-LS-1-1	4	04/23/2015	03/01/2015 to 03/31/2015
0874-00-02 /M05410000 /2		Osage & Co.	Sara	JC Lane	Submitted	OS-CP-2-1	4	04/23/2015	03/01/2015 to 03/31/2015
0874-00-03 /M05410000 /3		Osage & Co.	Sara	JC Lane	Submitted	OS-SR-3-1	4	04/23/2015	03/01/2015 to 03/31/2015
0874-00-04 /M05410000 /4		Osage & Co.	Sara	JC Lane	Submitted	OS-AC-4-1	4	04/23/2015	03/01/2015 to 03/31/2015

6 items found, displaying all items. 1

▸ [Favorite Contracts](#)

▸ [User Notes](#)



WisDOT: User Notes

User notes are added, changed and removed from the *User Profile* page. Click **Profile** on the main menu to go to the *User Profile* page.

The **User Notes** section is intended for reminders and for information that you want to save. Each note requires an associated start date and an end date. Notes can be up to 2000 characters in length.

Note: The end date for a user note is intended for your information, and you can use it as a due date. CARS does not automatically delete user notes after the end date.

Manage User Notes

1. Click **Add User Notes**. CARS opens the *Edit/New User Notes* page.
2. Type the note in the **User Note** field.
3. Change the date in the **Start Date** field, if needed. CARS opens a calendar control when your cursor is in either date field.

Note: The value in the **Start Date** field defaults to the current date.

4. Enter date in the **End Date** field.
5. Click **Save**. CARS opens the *View User Note* page showing the message “Record added Successfully”, the note text, and its associated start and end dates.

The screenshot shows the 'User Profile' page with an 'Edit Profile' button in the top right. Below the profile information, there is a section for 'User Notes'. It indicates 'One item found. 1' and includes an 'Add User Notes' button with a red '1' notification. A table below shows one user note:

User Note Text	Start Date	End Date		
BTS contracts due	01/08/2016	01/08/2016		

At the bottom of the table, it says 'One item found. 1'.

The screenshot shows the 'Edit/New User Notes' form. It has a 'User Note' field (2) containing 'Call Brenda for code', a 'Start Date' field (3) with '07/01/2014', and an 'End Date' field (4). A calendar control is open for the 'End Date' field, showing July 2014 with the 10th highlighted. At the bottom, there are 'Save' (5) and 'Cancel' buttons.



WisDOT: User Notes - continued

6. Click **Cancel** if the note is saved and you do not need to make changes. CARS returns to the *User Profile* page, where the new note now appears in the **User Notes** section.
7. You can also click **Edit** to return to the *View User Note* page, or click **Delete** to remove the note.

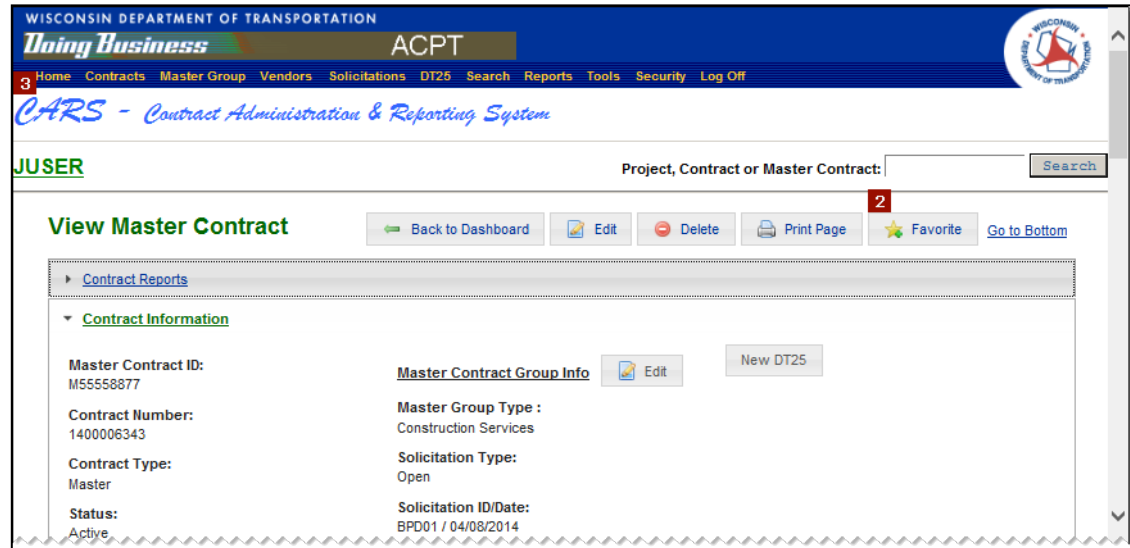


WisDOT: Favorite Contracts

Use Favorite Contracts functionality to place links to a specific *View Contract* page on your *Dashboard* page. Using favorite contracts links is faster than using the search tools, especially when there are several contracts associated with a project.

Add a Favorite Contract

1. Open the *View Contract* page for a contract or master contract:
 - Path: **Search** → **Contracts**
 - Use the search tools (see page 25) to locate the contract.
2. Click **Favorite**. CARS adds this contract to the **Favorite Contracts** section on your *Dashboard* page. The **Favorite** button changes to the **Undo Favorite** button.
3. Click **Home** on the main menu to go to the *Dashboard* page, and then confirm that this contract was added to your favorites.



The screenshot shows the CARS web application interface. At the top, there is a navigation bar with the Wisconsin Department of Transportation logo and the text "Doing Business ACPT". Below this is a menu with items: Home, Contracts, Master Group, Vendors, Solicitations, DT25, Search, Reports, Tools, Security, Log Off. The main header area displays "CARS - Contract Administration & Reporting System" and a search bar labeled "Project, Contract or Master Contract:" with a "Search" button. The user is logged in as "JUSER". The main content area is titled "View Master Contract" and includes several action buttons: "Back to Dashboard", "Edit", "Delete", "Print Page", "Favorite" (with a red notification badge), and "Go to Bottom". Below these buttons is a section for "Contract Information" with a "New DT25" button. The contract details are as follows:

Master Contract ID: MS5558877	Master Contract Group Info [Edit]
Contract Number: 1400006343	Master Group Type : Construction Services
Contract Type: Master	Solicitation Type: Open
Status: Active	Solicitation ID/Date: BPD01 / 04/08/2014




WisDOT: Favorite Contracts - continued

Remove a Favorite Contract

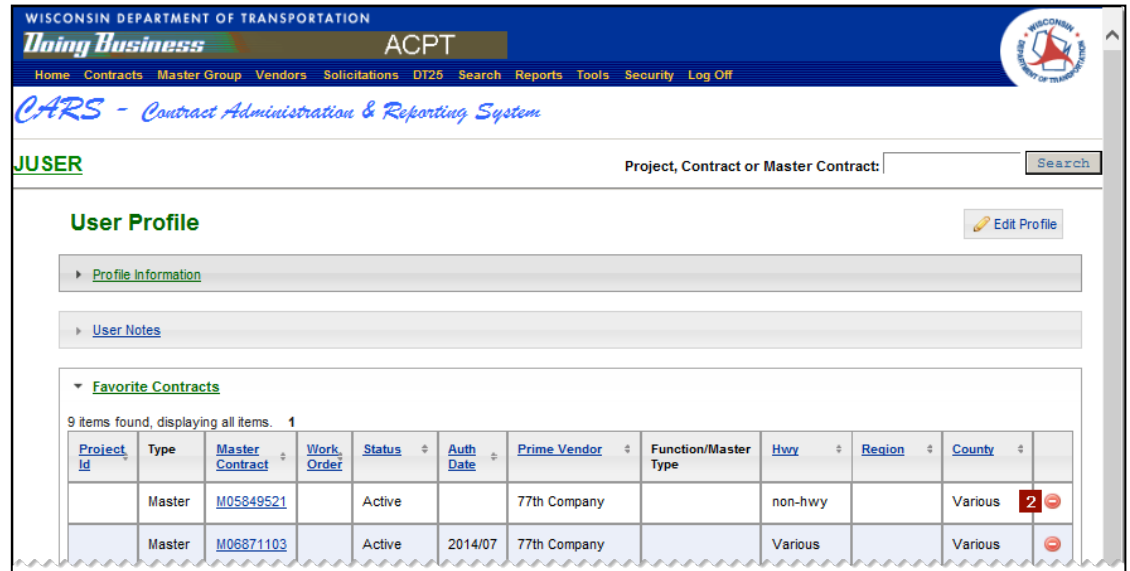
There are two places to remove a contract from your favorites: on the *View Contract* page for a contract and on your *User Profile* page.

User Profile Page



1. Click your user name in the upper left corner of any page to go to the *User Profile* page.
2. In the **Favorite Contract** section, locate the appropriate contract and click **Delete User Favorite** .

View Page

- On the *View* page for a contract or master contract, click **Undo Favorite**. CARS removes the contract from the **Favorite Contracts** section on your *Dashboard* page.



The screenshot shows the CARS (Contract Administration & Reporting System) interface. The user is logged in as 'JUSER'. The page displays the 'User Profile' section with a search bar for 'Project, Contract or Master Contract'. Under the 'Favorite Contracts' section, there is a table with 9 items found, displaying 1 item. The table has columns for Project Id, Type, Master Contract, Work Order, Status, Auth Date, Prime Vendor, Function/Master Type, Hwy, Region, and County. Two rows are visible, each with a red minus icon in the final column.

Project Id	Type	Master Contract	Work Order	Status	Auth Date	Prime Vendor	Function/Master Type	Hwy	Region	County	
	Master	M05849521		Active		77th Company		non-hwy		Various	
	Master	M06871103		Active	2014/07	77th Company		Various		Various	



WisDOT: User Profiles

Use these steps to manage your profile information and your region and bureau information. For details on the **Additional Regions** section, see *WisDOT: Additional Regions* on page 51. For details on user notes, see *WisDOT: User Notes* on page 46. For details on favorites, see *WisDOT: Favorite Contracts* on page 48.

Edit User Profile

1. Click **Profile** on the main menu. CARS opens the *User Profile* page.
2. Click **Edit Profile**. CARS opens the *Edit User Profile* page.
3. Change your user profile information as needed. You can change your name, primary region, email address and phone number.
 - a. Changing the value in the **Regions** field modifies your primary region. See *WisDOT: Add Additional Regions* on page 51 for instructions for adding secondary regions.
 - b. Changing the value in the **Email Address** field modifies the email address that CARS uses for evaluation and invoice notifications.
4. Click **Save**.

The screenshot shows the CARS (Contract Administration & Reporting System) interface. At the top, there is a navigation bar for the State of Wisconsin Department of Transportation with links for Home, Master Group, Vendors, Solicitations, DT25, Search, Reports, Security, Profile, and Log Off. The ACPT logo is in the top right. Below the navigation bar, the CARS logo and title are displayed. A search bar is present with the text "Project, Contract or Master Contract:". The main content area is titled "User Profile" and includes an "Edit Profile" button. The profile information is displayed in a table-like format:

First Name:	Ali
Last Name:	User
Middle Initial:	
Suffix:	
Region:	BPD
Email Address:	aliuser28@
Phone Number:	

Below the profile information, there are three expandable sections: "Additional Regions", "User Notes", and "Favorite Contracts".

The screenshot shows the "Edit User Profile" form. It includes a "Default Region" section with a note: "* Indicates required field". The form fields are:

- First Name: * (text input: Ali)
- Last Name: * (text input: User)
- Middle Initial: (text input)
- Suffix: (text input)
- Regions: * (dropdown menu: BPD)
- Email Address: * (text input: aliuser28@)
- Phone Number: * (text input: 111-111-1111)

At the bottom of the form, there are "Save" and "Cancel" buttons. A red box labeled "4" is positioned over the "Save" button.



Additional Regions

Add Additional Regions

You can add additional regions and bureaus to your profile if you work with contracts that cross region or bureau boundaries. Currently, region and bureau settings do not affect security and settings in CARS.


1. Click **Profile** on the main menu. CARS opens the *User Profile* page.
2. Click **Add Additional Regions** in the **Additional Regions** section. CARS opens the *Additional Region* page.
3. Select a region or bureau in the **Regions** field.
4. Click **Save**.

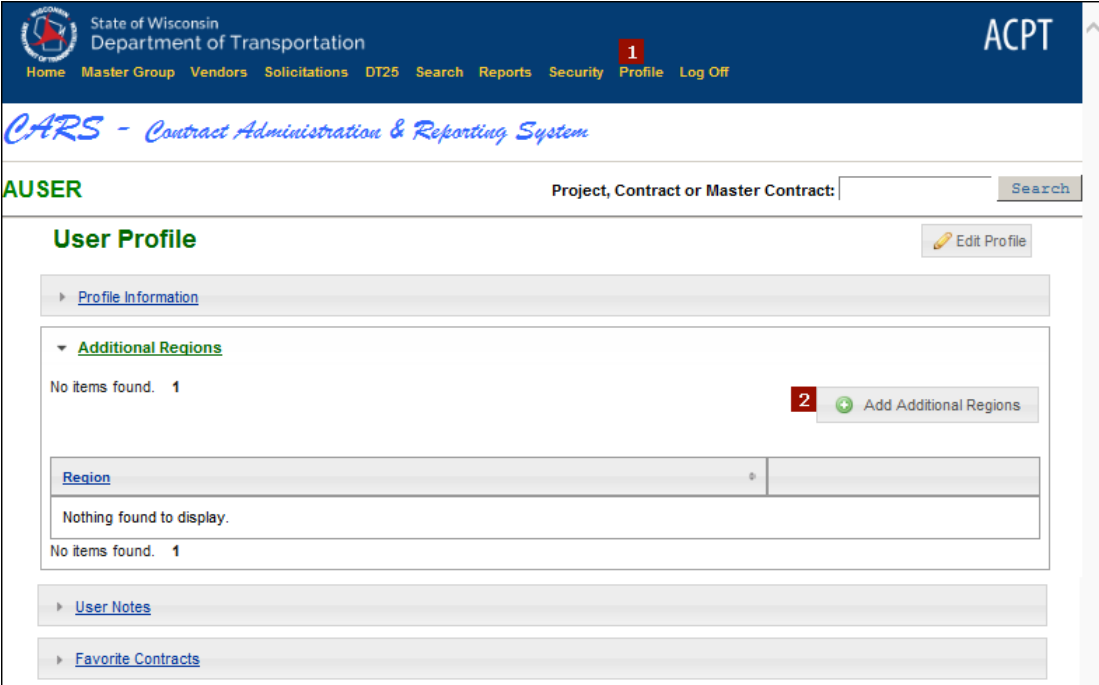
The screenshot shows the CARS User Profile page. At the top, there is a navigation bar for the State of Wisconsin Department of Transportation with the ACPT logo. The main menu includes Home, Master Group, Vendors, Solicitations, DT25, Search, Reports, Security, Profile (highlighted with a red '1'), and Log Off. Below the navigation bar, the page title is 'CARS - Contract Administration & Reporting System'. The user is identified as 'AUSER'. There is a search bar for 'Project, Contract or Master Contract:'. The 'User Profile' section has an 'Edit Profile' button. Under the 'Additional Regions' section, it says 'No items found. 1' and there is a red '2' next to an 'Add Additional Regions' button. Below this is a 'Region' dropdown menu and a message 'Nothing found to display.' with 'No items found. 1' below it. Other sections include 'User Notes' and 'Favorite Contracts'.

The screenshot shows the 'Additional Region' page. It has the same navigation bar as the previous screenshot. The main menu includes Home, Master Group, Vendors, Solicitations, DT25, Search, Reports, Security, Profile, and Log Off. The page title is 'CARS - Contract Administration & Reporting System'. The user is identified as 'AUSER'. There is a search bar for 'Project, Contract or Master Contract:'. The 'Additional Region' section has a 'Regions:' dropdown menu with 'SE' selected, highlighted with a red '3'. Below the dropdown are 'Save' and 'Cancel' buttons, with a red '4' next to the 'Save' button.



Remove Additional Regions

1. Click **Profile** on the main menu. CARS opens the *User Profile* page.
2. Click **Delete User Profile Region**  in the **Additional Regions** section. CARS displays the message, “Are you sure you want to DELETE User Profile Region?”
3. Click **Confirm**. CARS removes the secondary region from the profile.



State of Wisconsin
Department of Transportation

Home Master Group Vendors Solicitations DT25 Search Reports Security **1** Profile Log Off

ACPT

CARS - Contract Administration & Reporting System

AUSER Project, Contract or Master Contract: Search

User Profile Edit Profile

[Profile Information](#)

Additional Regions

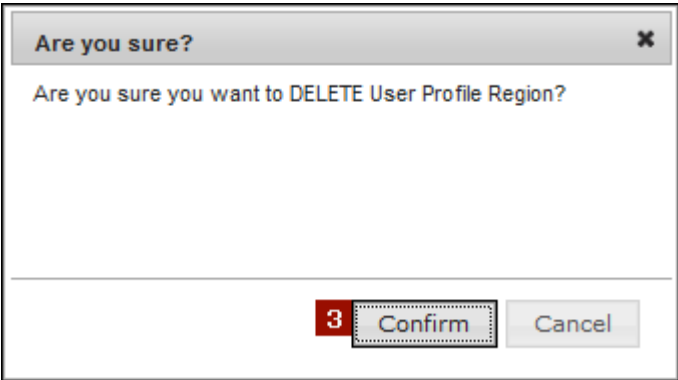
No items found. 1 **2** Add Additional Regions

Region
Nothing found to display.

No items found. 1

[User Notes](#)

[Favorite Contracts](#)



Are you sure?

Are you sure you want to DELETE User Profile Region?

3 Confirm Cancel



WisDOT: View Uploaded Contract Documents

As of July 2016, contract documents will be uploaded into CARS. Paper copies will continue to be stored in Central Files and sent to consultants and municipalities, but regions and bureaus will no longer retain hard copies. WisDOT users may view contract documents directly in CARS on the View Contract. Only users with the CARS Administrator role may upload and manage contract documents.

Contract documents stored as PDF files in CARS are named according to a naming convention. The file name contains the following components, in order:

1. Project ID
2. Master contract ID
3. "WO" + work order number
4. CARS contract number
5. Authorization date as YYYYMM
6. Document type identifier

Contract documents and amendment documents are each divided into four types of content for future security segregation. Document identifiers indicate the content of the PDF and include the following:

Document Type	Content	Identifier
Contract	Contract pages, including subcontracts and amendments	C
DBE	DBE forms	D
Fee Comp	Fee Compensation details	F
WisDOT	DT25 forms, signature pages, authorization letters	W
Amendment Contract	Amendment contract pages, including subcontracts	CA + amendment number
Amendment DBE	Amendment DBE forms	DA + amendment number
Amendment Fee Comp	Amendment fee Compensation details	FA + amendment number
Amendment WisDOT	Amendment DT25 forms, signature pages, authorization letters	WA + amendment number

Regular contract file names do not contain master contract and work order number. Master contract file names do not contain work order numbers

Examples:

Contract document (DBE)	10170033-823051017-20050826-D
Contract Amendment 1	10170033-823051017-20050826-FA1
Master Contract	16460701-M10005555-606025555-20030331-C
Work Order	16460701-M10005555-WO2-606025555-20030331-W



View Uploaded Documents for a Contract - continued

The following images show uploaded contracts for a regular contract with an amendment, and for a work order.

View Contract

[← Back to Dashboard](#)
[Create Invoice](#)
[Import Invoice](#)
[New Evaluation](#)
[Edit](#)
[Delete](#)

[Print Page](#)
[Favorite](#)
[Go to Bottom](#)

Contract Uploaded Documents

7 items found, displaying all items. 1

File Name	Amendment No	Document Description	Created Date	-
10000004-72410100-20100922-C.pdf		Contract	June 17, 2016 12:42:18	-
10000004-72410100-20100922-D.pdf		DBE Forms	June 17, 2016 12:42:08	-
10000004-72410100-20100922-F.pdf		Fee Comps	June 17, 2016 12:41:53	-
10000004-72410100-20100922-W.pdf		WisDOT	June 17, 2016 12:41:39	-
10000004-72410100-20100922-CA1.pdf	1	Contract	June 17, 2016 12:47:21	-
10000004-72410100-20100922-FA1.pdf	1	Fee Comps	June 17, 2016 12:47:12	-
10000004-72410100-20100922-WA1.pdf	1	WisDOT	June 17, 2016 12:47:00	-

7 items found, displaying all items. 1

View Work Order

[← Back to Search Results](#)
[Create Invoice](#)
[Import Invoice](#)
[View Evaluation](#)

[New Evaluation](#)
[Edit](#)
[Delete](#)
[Print Page](#)
[Favorite](#)
[Go to Bottom](#)

WorkOrder Uploaded Documents

4 items found, displaying all items. 1

File Name	WorkOrder No	Amendment No	Document Description	Created Date	-
06562211-M06971007-WO2-1400001042-20131029-C.pdf	2		Contract	June 17, 2016 12:50:06	-
06562211-M06971007-WO2-1400001042-20131029-D.pdf	2		DBE Forms	June 17, 2016 12:49:57	-
06562211-M06971007-WO2-1400001042-20131029-F.pdf	2		Fee Comps	June 17, 2016 12:49:47	-
06562211-M06971007-WO2-1400001042-20131029-W.pdf	2		WisDOT	June 17, 2016 12:49:37	-

4 items found, displaying all items. 1



WisDOT: View Contract Uploaded Documents

1. Search for and open the contract or work order as described in [Search Contracts](#) on page 26.
2. Expand the **Uploaded Documents** section at the top of the page.
3. Click the hyperlink for the appropriate document. CARS opens the PDF in the same window.
4. The Acrobat toolbar appears mid-page. Use these controls to perform the following actions:
 - a. Save
 - b. Print
 - c. Zoom
 - d. Close the toolbar
5. Use the scroll bar to move the view within the PDF.
6. Click **Back** to return to the CARS *View Contract* page.

View Work Order

[← Back to Search Results](#)
[Create Invoice](#)
[Import Invoice](#)
[View Evaluation](#)
[New Evaluation](#)
[Edit](#)

[Delete](#)
[Print Page](#)
[Favorite](#)
[Go to Bottom](#)

2 [WorkOrder Uploaded Documents](#)

One item found. 1

File Name	WorkOrder No	Amendment No	Document Description	Created Date
3 90060300-M06959312-WO202-115119501-20141024-C.pdf	202		Contract	June 14, 2016 12:35:50

One item found. 1

[Master Contract Reports](#)

[Master Information](#)

Master Contract ID: [M06959312](#)
 Contract Number : 115119501
 [Master Contract Group Info](#)

View Contract Document

Contract No: 115119501
 Document Type Description: Contract
 Created Date: Tue Jun 14 12:35:50 CDT 2016

ⓘ This file claims compliance with the PDF/A standard and has been opened read-only to prevent modification.
 [Enable Editing](#)

a **b** **c** **d**

MASTER CONTRACT WORK ORDER
 BETWEEN THE WISCONSIN DEPARTMENT OF TRANSPORTATION (DEPARTMENT)
 AND _____ INC (CONSULTANT) FOR
 MASTER CONTRACT TYPE: LOCAL PROGRAM MANAGEMENT
 MASTER CONTRACT PROJECT ID 0695 - 93 - 12
 WORK ORDER NUMBER 202
 Project ID 9006-03-00
 Oconto Sidewalk and Crossing Improvements
 City of Oconto
 Oconto County
 DOT FOS OBJECT CODE 5500

C.O. FILES

This WORK ORDER made and entered into by and between the DEPARTMENT and the
 CONSULTANT

5

6 [Back](#)



Consultants: Management Consultant Dashboards

Management Consultants are granted special access to their company contracts by the WisDOT Regional Administrators. They use the Local Program Reviewer role for their firms. This role allows the Management Consultants to manage contracts, evaluations and invoices for other firms that they oversee.

Management Consultants have dashboards and menus like those of WisDOT users. The page shown below is an example of a Management Consultant's *Dashboard* page.

The screenshot displays the user interface of the CARS system. At the top, there is a dark blue header with the State of Wisconsin Department of Transportation logo and navigation links: Home, Master Group, Vendors, Solicitations, DT25, Search, Reports, Profile, and Log Off. Below the header, the system title "CARS - Contract Administration & Reporting System" is shown in a blue script font. The main content area features the user's name "NSHAE" in green text on the left and a search bar on the right labeled "Project, Contract or Master Contract:" with a "Search" button. The dashboard contains four menu items, each with a right-pointing arrow and a blue underlined link: "Evaluations", "Invoices", "Favorite Contracts", and "User Notes". A vertical scrollbar is visible on the right side of the dashboard area.



Consultants: Dashboards

The vendor *Dashboard* page displays the prime contracts, master contracts, projects, subcontracts and amendments assigned to your firm; invoices for these contracts and subcontracts; and evaluations sent to your firm.

Click **Home** on the main menu on any page to return to the *Dashboard* page.

Consultants: Dashboard Elements and Filters

1. The main menu contains the command menus as described on page 21. The menus you see depend on the roles you have. For example, the **Security** command is visible only to persons who have the Vendor Administrator role.
2. Your user ID and full name appear in the heading at the top of the page.
3. Your firm name appears in the heading at the top of the page after “processing on behalf of”.
4. Use the search tools (see page 25) to locate a specific prime project, contract or master contract.

Prime Contracts

Status: Active Project ID: [Filter]

44 items found, displaying 1 to 10. [First/Prev] 1, 2, 3, 4, 5 [Next/Last]

Project Id	Limits	Type	Master Contract	Work Order	Status	Auth Date	Prime Vendor	Function/Master Type	Hwy	Region	County
7777-88-99		Local road	Regular		Active	2014/12	Osage & Co.	Construction Services	STH 51	NW	Dunn

Sub-Contracts

Project ID: [Filter] Prime Vendor: [Filter]

5 items found, displaying all items. 1

Contract	Type	Status	Limits	Auth Date	Prime Vendor	Function	Hwy	Region	County
0098-00-01 - 1400008163 - 03/02/2015	Regular	Active	non-hwy	2015/03	Axel Construction	In-Plant Inspection Services	non-hwy	BHM	Various

Amendment SubContracts

Project ID: [Filter] Prime Vendor: [Filter]

One item found. 1

Contract	Type	Status	Limits	Auth Date	Prime Vendor	Function	Hwy	Region	County
0098-00-08 - 1400008176 - 01/05/2015 - 1	Regular	Active	non-hwy	2015/03	Axel Construction	Training Services	non-hwy	BPD	Various

Invoices

9 items found, displaying all items. 1

Project Id / Master NVO #	Type	Prime Vendor	Contact Name	Project Manager	Status	Consultant Invoice#	Created Date	Invoice Period
0099-11-13		Osage & Co.	Kane, John Faux	Vos, Nick	Draft	Osg1113	03/12/2015	03/01/2015 to 03/14/2015

Evaluations

4 items found, displaying all items. 1

Seq No	Reviewer	Contract / Master	Level / Project Id / NVO #	Processing Status	Status Date	Evaluation Period	Type	Function	Full Scope
1	Sara Reed	1400008422	5454-54-54	Ready for Review	08/25/2015	05/01/2015 to 06/24/2015	Final Evaluation	Construction	Yes



Consultants: Dashboard Elements - continued

5. There are five sections on the dashboard:
 - **Prime Contracts** shows a list of projects, prime contracts, master contracts and work orders.
 - **Sub-Contracts** shows a list of subcontracts.
 - **Amendment Subcontracts** shows a list of amendments.
 - **Invoices** shows a list of invoices except paid ones. Invoices for subcontracts have the letter “S” in the **Type** column, and invoices for amendment subcontracts have the letter “A” in the **Type** column. “CM” indicates that the invoice is for an invoice that has a combination of types.
 - **Evaluations** shows contract and work order evaluations from WisDOT for your review.

Note: Click the **Expand/Collapse** arrow to expand sections to show data in the section. Click the **Expand/Collapse** arrow again to hide the section and consolidate the page.

6. CARS provides tools to filter the **Prime Contract** table. Enter filter parameters, and then click **Filter**. You can use one or both filter fields. Delete filter parameters and click **Filter** again to restore the full list of contracts.
 - a. Select *Active*, *Cancelled* or *Complete* in the **Status** field.
 - b. Enter a project ID in the **Project ID** field to limit the prime contracts list temporarily. This field uses the autocomplete feature to list the first ten matching project IDs. As you type more digits, CARS updates the list of matching projects.



Consultants: Dashboard Elements - continued

7. CARS provides page controls when a contract list is longer than 10 contracts. Contracts are listed in numerical order by default. If you sort based on one of the table headings, the revised sort order is preserved when you select another page.
 - Click “First” to go to the first 10 contracts listed.
 - Click “Prev” to go to the previous page in the sequence.
 - Click a page number to display that page.
 - Click “Next” to go to the next page in the sequence.
 - Click “Last” to go to the last page in the sequence.
8. CARS provides tools to filter the **Sub-Contracts** table. Enter filter parameters, and then click **Filter**. You can use one or both filter parameters. Delete filter parameters and click **Filter** again to restore the full list of subcontracts.
 - a. Enter a project ID in the **Project ID** field to limit the subcontracts list temporarily. This field uses the autocomplete feature to list the first 10 matching project IDs. As you type more digits, CARS updates the list of matching projects.
 - b. Enter the prime vendor name in the **Prime Vendor** field to limit the subcontracts list temporarily. This field uses the autocomplete feature to list matching vendor names. Select the vendor name in the list.

The screenshot shows the CARS interface with the following elements highlighted:

- 1**: State of Wisconsin Department of Transportation logo and navigation links (Home, Search, Security, Profile, Log Off).
- 2**: CARS - Contract Administration & Reporting System title.
- 3**: User information: JUSER - J User processing on behalf of Osage & Co.
- 4**: Search bar for Project, Contract or Master Contract.
- 5**: Prime Contracts section header.
- 6**: Filter fields for Status (Active) and Project ID.
- 7**: Table of Prime Contracts with 44 items found, displaying 1 to 10. The first row is highlighted.
- 8**: Sub-Contracts section header.
- 9**: Filter fields for Project ID and Prime Vendor.
- 10**: Table of Amendment SubContracts with 1 item found. The first row is highlighted.
- 11**: Table of Invoices with 9 items found, displaying all items. The first row is highlighted.
- 11**: Table of Evaluations with 4 items found, displaying all items. The first row is highlighted.



Consultants: Dashboard Elements - continued

9. CARS provides tools to filter the **Amendment SubContracts** table. Enter filter parameters, and then click **Filter**. You can use one or both filter fields. Delete filter parameters and click **Filter** again to restore the full list of amendment subcontracts.
 - a. Enter a project ID in the **Project ID** field to limit the subcontracts list temporarily. This field uses the autocomplete feature to list the first 10 matching project IDs. As you type more digits, CARS updates the list of matching projects.
 - b. Enter the prime vendor name in the **Prime Vendor** field to limit the subcontracts list temporarily. This field uses the autocomplete feature to list matching vendor names. Select the vendor name in the list.
10. CARS provides tools to sort lists. The heading rows of columns you can sort contain the title as a blue link and a double arrow. Click the heading row once to sort in ascending order (A to Z). Click again to reverse the order (Z to A). The double arrow changes to a single arrow to indicate which order is shown.
11. Identifiers such as contract IDs often serve as links to specific records. If the staff member has been granted access to the contract or work order, the ID is an active link. If not, then the ID appears as plain black text.

The screenshot displays the CARS dashboard with the following sections and data:

Prime Contracts

Project Id	Limits	Type	Master Contract	Work Order	Status	Auth Date	Prime Vendor	Function/Master Type	Hwy	Region	County
		Master	M06871126		Active	2014/05	Osage & Co.		51		Various
0687-11-27	County line	Regular			Active	2014/06	Osage & Co.	Traffic Engineering Services	STH 51	SW	Dane

Sub-Contracts

Contract	Type	Status	Limits	Auth Date	Prime Vendor	Function	Hwy	Region	County
0098-00-01 : 1400008163 : 03/02/2015	Regular	Active	non-hwy	2015/03	Axel Construction	In-Plant Inspection Services	non-hwy	BHM	Various
1380-00-01 : M06972085 : 18 : 1400003172 : 08/06/2014	Work Order	Active	STH 14 to STH 81	2014/08	Acme Inc.	Biological	STH 259	SE	Ozaukee

Amendment SubContracts

Contract	Type	Status	Limits	Auth Date	Prime Vendor	Function	Hwy	Region	County
0098-00-08 : 1400008176 : 01/05/2015 : 1	Regular	Active	non-hwy	2015/03	Axel Construction	Training Services	non-hwy	BPD	Various

Invoices

Project Id / Master / WO #	Type	Prime Vendor	Contact Name	Project Manager	Status	Consultant Invoice#	Created Date	Invoice Period
0099-11-13		Osage & Co.	Max Brewer		Draft	Osg1113	03/12/2015	03/01/2015 to 03/14/2015
0874-00-04 / M05410000 / 4		Osage & Co.	Sara	JC Lane	Draft	OS-AC-4-1B	04/23/2015	03/01/2015 to 03/31/2015

Evaluations

Seq No	Reviewer	Contract / Master	Level / Project Id / WO #	Processing Status	Status Date	Evaluation Period	Type	Function	Full Scope
1	Tom Bane	1400008164 / M00981001	0098-10-02 / 1	Ready for Review	04/01/2015	02/25/2015 to 04/30/2015	Intermediate Evaluation	Design	Yes



Consultants: User Profiles

Use these steps to manage your profile information and your region and bureau information.

Edit User Profile

1. Click **Profile** on the main menu. CARS opens the *User Profile* page.
2. Click **Edit Profile**. CARS opens the *Edit User Profile* page.
3. Change your user profile information as needed. You can change your name, email address and phone number.

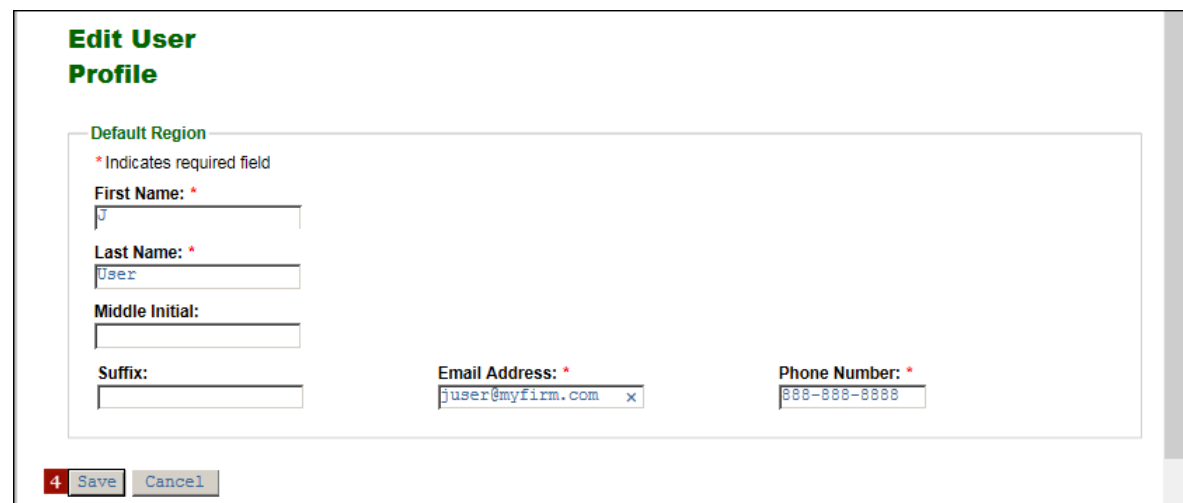
Changing the value in the **Email Address** field modifies the email address that CARS uses for evaluation and invoice notifications.

4. Click **Save**.



The screenshot shows the CARS (Contract Administration & Reporting System) interface. At the top, there is a navigation bar with the State of Wisconsin Department of Transportation logo and the text "ACPT". Below this, the "Profile" menu item is highlighted with a red "1". The main content area displays the user profile for "JUSER - J User processing on behalf of Osage & Co.". A search bar is visible on the right. The "User Profile" section includes a red "2" and an "Edit Profile" button. The profile information is displayed in a table-like format:

First Name:	J	Email Address:	juser56@yahoo.com
Last Name:	User	Phone Number:	(888) 888-8888
Middle Initial:			
Suffix:			



The screenshot shows the "Edit User Profile" form. The form is titled "Edit User Profile" and includes a "Default Region" section. Below this, there are several input fields for user information, with asterisks indicating required fields:

- First Name: * (input field containing "J")
- Last Name: * (input field containing "User")
- Middle Initial: (input field)
- Suffix: (input field)
- Email Address: * (input field containing "juser@myfirm.com" and a close button "x")
- Phone Number: * (input field containing "888-888-8888")

At the bottom of the form, there are "Save" and "Cancel" buttons, with a red "4" next to the "Save" button.



Invoicing

Invoicing processes are the same for regular contracts and work orders, and they are the same for prime consultants and sub-consultants. Prime contract invoices are submitted to WisDOT, and sub-consultant invoices are submitted to the next higher tier (either prime consultant or a higher-tier subcontractor). Higher tier consultants can view and reject sub-consultant invoices.

Quick Facts about Invoicing in CARS

- Only one invoice in “Draft” status is allowed for a given contract. You must submit or delete an invoice draft for a contract before you can create another one.
- “Draft” status invoices are accessible and freely editable only by staff members who have the appropriate roles.
- WisDOT cannot access “Draft” status invoices created by consultant firms, nor do they appear on WisDOT user dashboards.
- Invoices in “Paid” status are not listed on WisDOT dashboards. Search for these invoices as described in *Search Invoices* on page 31.
- Consultant *Dashboard* pages list only invoices in “Draft” status.
- Users who have the View Invoice role cannot see rate or cost details. Direct labor cost, indirect cost rate, and indirect cost fields are hidden.
- Invoices can contain costs for more than one month, provided costs for different months are entered as separate line items.
- Invoice adjustments made by WisDOT invoice approvers are added as new lines on the invoice. Submitted data is maintained as part of an audit trail.
- Invoice maximums are managed separately for each firm on the contract. Primes should not bill subconsultant costs as one of their expenses.

Invoice Roles

WisDOT users must have either the Invoice Editor or the Invoice Approver role to make changes to invoices. Only users who have Invoice Approver can approve invoices. Invoice Reviewer users can review submitted invoices but not approve them. WisDOT users who have the View Invoice role can read invoices, but cannot change or approve them. Users who have the View Invoice role can read invoices, but cannot make any changes.

To manage invoices, a consultant staff member must have the Invoice Editor or Invoice Submitter role for the specific contract, or Subcontract Invoice Editor or Subcontract Invoice Submitter when working on subcontracts. The staff member who submits invoices to WisDOT or to a higher tier contractor must have the Invoice Submitter or Subcontract Invoice Submitter role. Users who have the View Invoice or Subcontractor View Invoices roles can read invoices, but cannot make changes.

- Subcontractor invoices are submitted to the prime contractor or the next higher tier subcontractor in cases where the subcontractor is working for another subcontractor.
- Consultants can include invoices for their subcontractors with their invoices for payment, and then pay the subcontractors. The alternative is to reject the subcontractor invoice. Contractors cannot make any changes to subcontractor invoices.
- Consultants can create invoices for their subcontractors directly. Higher tier consultants should determine whether they want their subcontractors to create their own invoices and submit them, or always create invoices for their subcontractors.



Invoicing Processes

Consultants create invoices, add cost information and upload supporting documentation before submitting the invoice to WisDOT. WisDOT reviews and approves the invoice for payment. If there is a question about an expense, WisDOT may adjust the invoice and send it for payment instead of causing payment to be withheld. Expenditure Accounting pays the invoice.

Subcontractors follow the same processes as prime consultants. The differences in subcontractor invoicing processes are as follows:

Invoice Statuses

- Accepted by Higher Tier
- Approved
- Approved - Sent to Acct Sys
- Approved - Zero or Negative invoice
- Checked out for Payment
- Draft
- Draft for subcontract
- Included in Higher Tier
- Included in Invoice
- Paid
- Paid Special
- Rejected
- Rejected by Higher Tier
- Reviewed
- Sent Back to Approver
- Submitted
- Submitted to Higher Tier



Invoicing Process Diagram

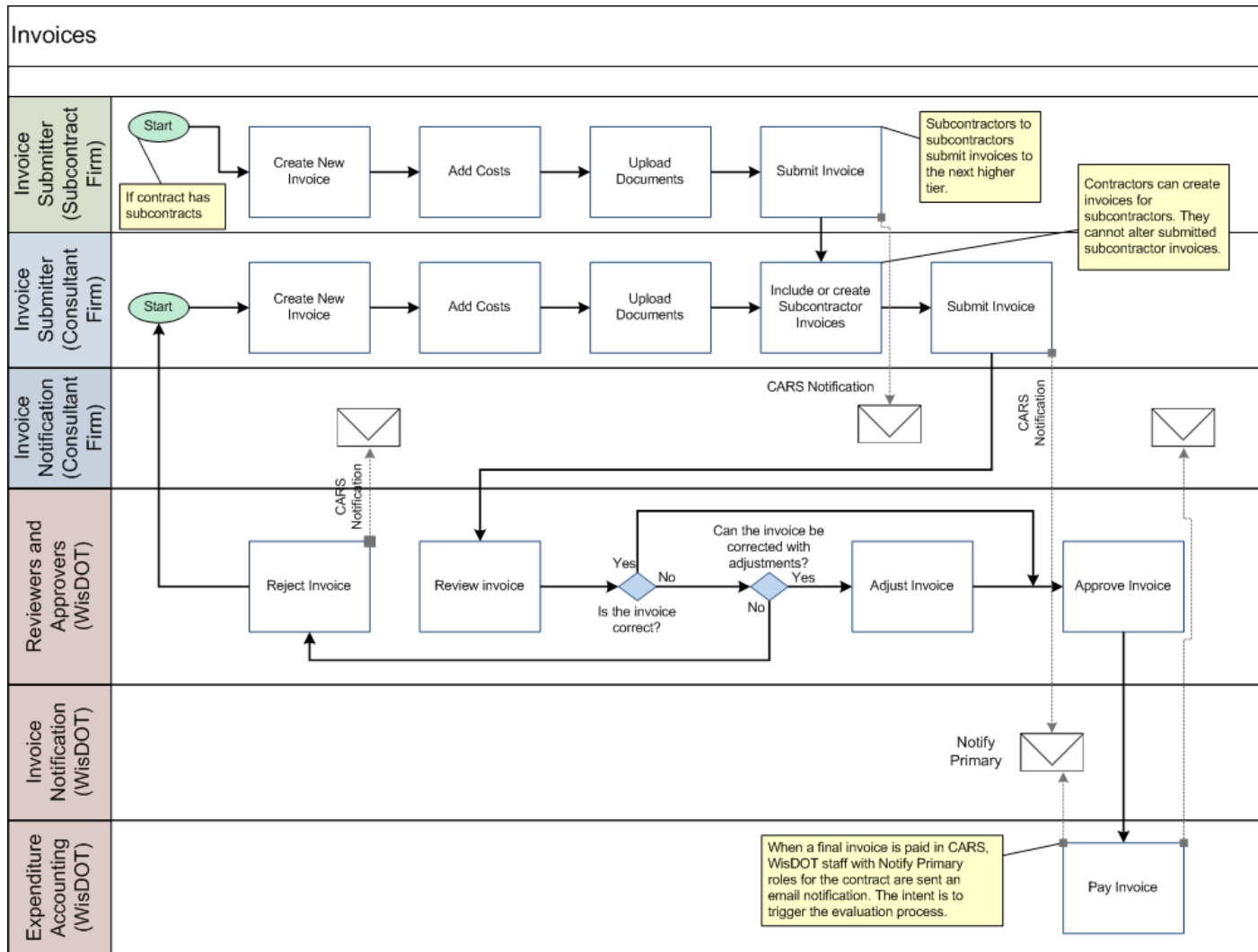


Figure 1 - Invoice Process Diagram



Redistribution Contracts

Redistribution contract provisions (formerly called journal voucher (JV) contracts) are described in the Facilities Development Manual (FDM) in [chapter 8, section 15-2](#). These contracts are currently paid like invoices for other projects in CARS. Form [DT1511](#) is required for JV contracts and must be included in the invoice documentation.

Note: Page 2 of form DT1511 is now optional. Page 1 is still required.

Invoice Notifications

CARS automatically sends email notification to either WisDOT or consultant users when the status of an invoice changes. Messages are routed to persons who have notification roles for the individual project ID. CARS also sends email notifications when the status of an invoice does not progress within a set time period. The invoice must be either approved or rejected in order to progress. The following table summarizes invoice notifications.

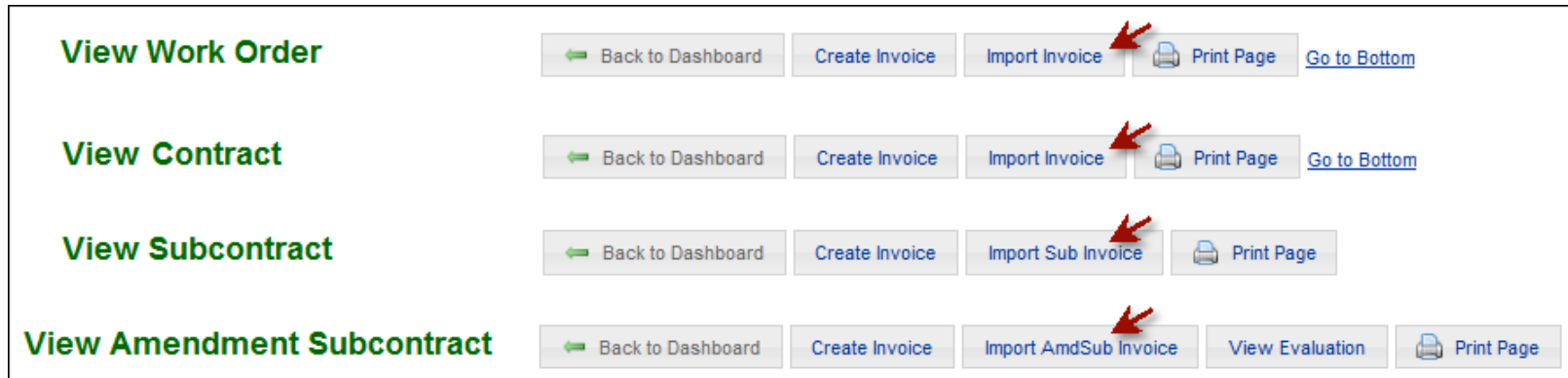
<u>New status</u>	<u>Status changed by</u>	<u>Email sent to</u>
Submitted	Prime Consultant	WisDOT users with the Primary Notification role receive email immediately upon invoice submission. Future versions of CARS will also send reminders at days 10 and 20, and every day after 20 days until the invoice is approved or rejected. WisDOT users with Secondary Notification receive email at days 10 and 20 and every day after 20 days until the invoice is approved or rejected.
Submitted	Sub Consultant	Prime vendor users with the Primary Notification role receive email immediately upon invoice submission. Future versions of CARS will also send reminders at days 10 and 20, and every day after 20 days until the invoice is approved or rejected. If no vendor users have the invoice notification role for this contract, the firm's Vendor Administrator receives the email.
Paid	WisDOT	Prime consultants and subconsultants with the Invoice Notification role receive email when the invoice is paid. If no vendor users have the invoice notification role for this contract, the firm's Vendor Administrator receives the email.
Rejected	WisDOT	Prime consultants with the Invoice Notification role receive email when the invoice is rejected. If no vendor users have the invoice notification role for this contract, the firm's Vendor Administrator receives the email.
Rejected	Higher tier consultant	Sub consultants with the Invoice Notification role receive email when the invoice is rejected. If no vendor users have the invoice notification role for this contract, the firm's Vendor Administrator receives the email.



Import an Invoice

CARS allows you to import invoice information using an Extensible Markup Language (XML) document. The XML documents used to import data into CARS may be generated, for example, from your firm’s financial software using a custom routine. You can also export data to Microsoft Excel® or Access®, adjust the data as needed, and then create the XML invoice by pasting generated elements into a template or by using Visual Basic for Applications or another programming language to generate the invoice automatically. The XML document creation process will vary for every consultant. Currently, the invoice data must be imported for each contract separately; there is no batch process. XML invoices can be uploaded by prime consultants and by subcontractors. A prime consultant cannot upload XML for a subconsultant.

Many resources are available to help your firm generate the necessary XML invoice documents, including basic information on the [CARS page](#). See also [Appendix 13](#) on page 251 and [Appendix 14](#) on page 273.



The screenshot displays a user interface with four main sections, each containing a set of navigation buttons. Red arrows point to the 'Import Invoice' or 'Import Sub Invoice' buttons in each section:

- View Work Order:** Buttons include 'Back to Dashboard', 'Create Invoice', 'Import Invoice', 'Print Page', and 'Go to Bottom'.
- View Contract:** Buttons include 'Back to Dashboard', 'Create Invoice', 'Import Invoice', 'Print Page', and 'Go to Bottom'.
- View Subcontract:** Buttons include 'Back to Dashboard', 'Create Invoice', 'Import Sub Invoice', and 'Print Page'.
- View Amendment Subcontract:** Buttons include 'Back to Dashboard', 'Create Invoice', 'Import AmdSub Invoice', 'View Evaluation', and 'Print Page'.

Import XML Invoice Buttons

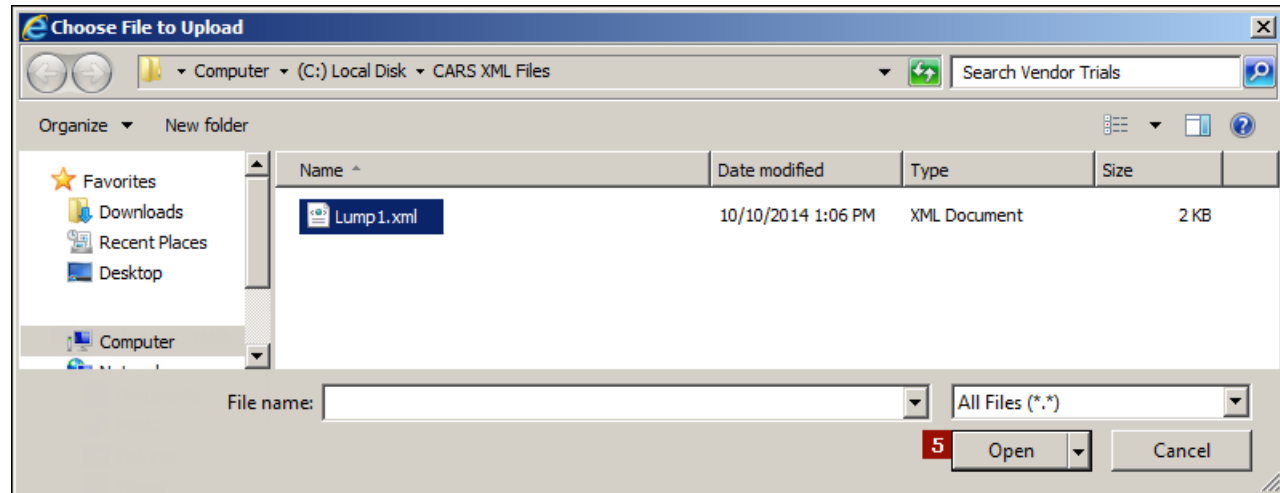
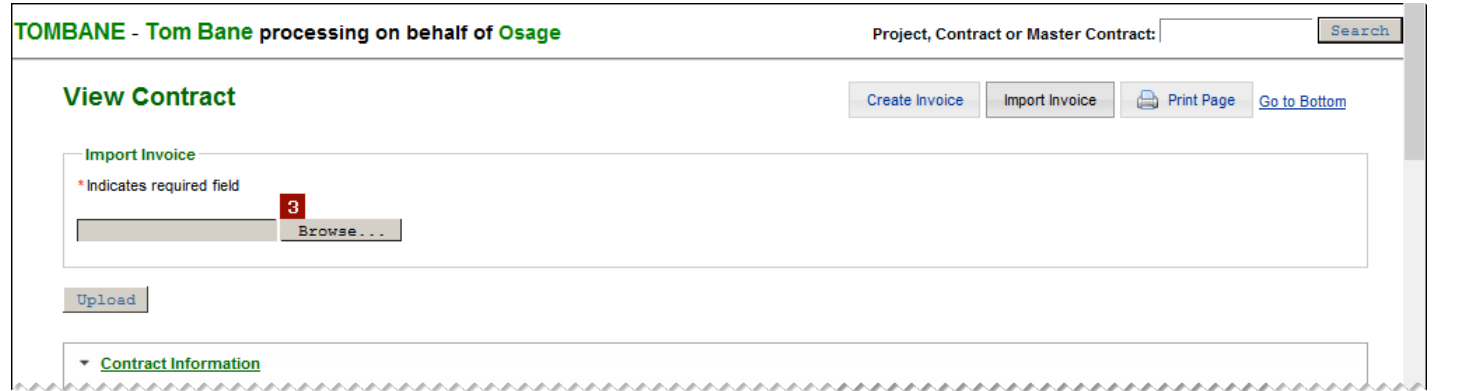
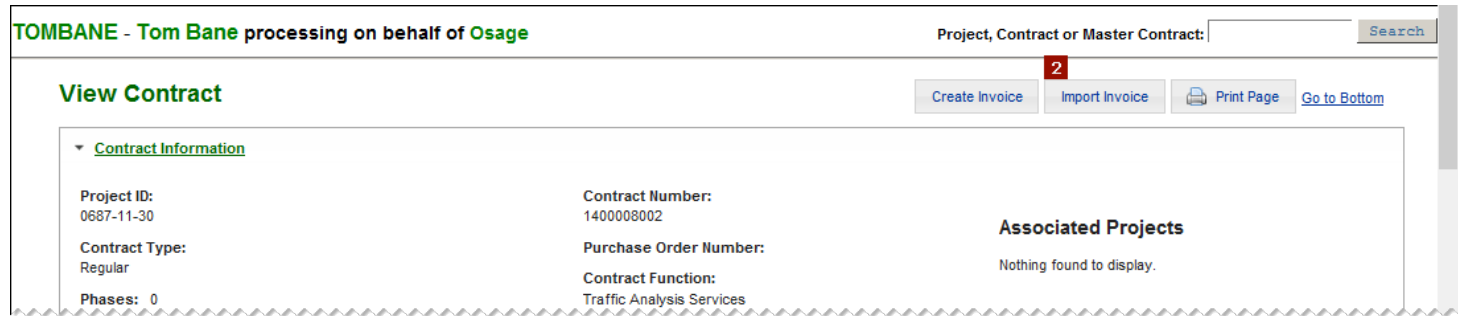


Import Invoice Steps

1. Open the contract or subcontract record for which you are entering an invoice in CARS. See [Search Tools](#) on page 25 for information on locating prime contract records.

Note: The appropriate Invoice Editor or Invoice Submitter role is required to import XML invoices.

2. Click **Import Invoice**; subcontractant s click **Import Sub Invoice**. CARS opens the **Import Invoice** section.
3. Click **Browse**. CARS opens the **Choose File to Upload** dialog box.
4. Browse to the XML file for upload and select it.
5. Click **Open**. CARS displays the path to the file in the **Browse** field.



Import Invoice - continued

6. Click **Upload**. CARS attempts to import the invoice.
 - a. If the import is successful, CARS opens the new invoice, which is in “Draft” status.
 - b. If there is an error and CARS cannot import the invoice, CARS displays an error message.
 - c. If CARS was able to import the invoice partially, you will see an error message along with the **Show Invoice** button. See [Consultants: Common Invoice Import Errors](#) on page 267 for more details. You can delete the invoice, adjust the XML document and try to import again, or manually edit the invoice directly in CARS as described in *Invoicing*, beginning on page 62.

Note: You must delete an existing draft invoice before you can import another one. Only one invoice in “Draft” status is allowed per contract.

7. Upload supporting documentation and submit the invoice as for manually entered invoices. See *Upload Supporting Documents* on page 92 and *Consultants: Submit Invoices* on page 96 for details.

TOMBANE - Tom Bane processing on behalf of Osage Project, Contract or Master Contract:

View Contract

Create Invoice Import Invoice Print Page Go to Bottom

Import Invoice

* Indicates required field

Sum Export Lump1.xml Browse...

6 Upload

Contract Information

TOMBANE - Tom Bane processing on behalf of Osage **b** Project, Contract or Master Contract:

View Errors

Print Page Back to View Contract

Upload Error List

--- Draft status already exists for Consultant Invoice Number Lump1

TOMBANE - Tom Bane processing on behalf of Osage **c** Project, Contract or Master Contract:

View Errors

Print Page Back to View Contract

Upload Error List

Consultant Invoice Number :11-25 Aug 2014 Show Invoice

--- Not found a record with 4 part key combination in the ContractCost table for LumpSum Line Items.



Consultants: Create a New Invoice

When you create a new invoice, CARS combines general information you enter and cost information from the contract in a new invoice record. If you have previously invoiced costs on this contract within CARS, submitted and paid totals are also shown and used in the calculations on the new invoice. You can also manually enter and edit total previous costs paid outside CARS (external costs) on the first invoice for a contract or project only. See *Consultants: First Invoice in CARS Question* on page 107 for details.

Only one invoice in “Draft” status is allowed for a given contract. You must submit or delete an invoice draft for a contract before you can create another one. If you try to create a new invoice when there is already one in “Draft” status, CARS displays the error message, “Cannot create invoice. One already exists in draft status.”

Sub-consultant users who create invoices in CARS must have security access to all subcontracts, amendment subcontracts and phases that apply to their firms in order for the invoice costs to be applied correctly. If you are missing access to one of these parts of a contract, please contact your firm’s CARS administrator.



Consultants: Create a New Invoice - continued

1. Open the contract you are invoicing.
2. Click **Create Invoice**. CARS opens the *Edit Invoice* page. Only consultant information can be entered or updated. Contract information is locked.
3. Select **No** under **Final Invoice**.
Select **Yes** only when the work for a contract is complete and you are submitting final costs.
4. Enter the invoice identifier of your choosing in the **Consultant Invoice Number** field. Follow your firm's conventions as required. This identifier is limited to 20 characters.
5. Enter dates in the **Start Date** and **End Date** fields. These dates refer to the period for which you are invoicing, not to the contract work period. This period may span more than one month.



Consultants: Create a New Invoice - continued

6. Enter the name and contact information of the person that WisDOT can contact if there are questions about the invoice in the **Name**, **Phone** and **Email** fields.
7. Click **Save**. CARS creates and opens the new invoice and assigns “Draft” status. No billed charges are added. Some monetary values from the contract are shown on this new invoice, but they are not invoice charges. A sample of a newly created invoice is shown in [Appendix 8: Sample Invoices in CARS and PDF of Submitted Invoice](#). See [Appendix 9: Invoice Sections](#) in for an explanation of the information shown on an invoice.
8. If this is the first invoice entered for this contract or project in CARS, you are asked if there were prior invoices that were paid outside CARS. Answer “Yes” or “No.” See *Consultants: First Invoice in CARS Question* on page 107 for details.

Note: You must enter the previous paid external amount on the first invoice in CARS before you submit it. This amount cannot be entered or edited on subsequent invoices.

Edit Invoice

▼ **Contract Invoice Information**

Consultant Name: Osage	FEIN/Loc: 987654321/0	PO Number:
State Project ID: 0751-32-58	Master Contract ID:	Work Order:
Project Description: county line	County: Clark	Contract Project Manager:

* Indicates required field

3 Final Invoice: * Yes No

4 Consultant Invoice Number: *
73 MTC 5-14 x

5 Time Period Covered by this Invoice:
Start Date: * 5/1/2014 End Date: * 05/31/2014

6 Consultant Contact:
Name: * Felicity Schreiber Phone: * 608-811-4597 Email: * fschreiber@osage.ccm

7 Save Cancel Create

Cancel

This is the first invoice in CARS for this contract/project.

Were there prior invoices for this contract/project?
 Yes No

Save



Consultants: Edit Contract Invoice Information

You can edit the consultant information while the invoice is in “Draft” status.

1. Click **Edit** in the **Contract Invoice Information** section. CARS opens the *Edit Invoice* page. Only consultant information can be updated.
2. Update the seven consultant information fields as needed.
3. Click **Save**.

View Invoice

[← Back to Dashboard](#)
[🗑 Delete Invoice](#)
[View Paid Invoices](#)

Contract Invoice Information

Consultant Name: Osage	FEIN/Loc: 987654321/0	PO Number:	Invoice ID: 21
State Project ID: 05/01/2014	Master Contract ID: 03/31/2014	Work Order:	Status:
Consultant Contact:			
Name: Felicity Schreiber	Phone: 608-811-4597	Email: fschreiber@osage.ccm	

1 [Edit](#)

Actual Cost

DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services [Edit](#)

Actual Cost

Edit Invoice

[← Back to Dashboard](#)
[🗑 Delete Invoice](#)
[View Paid Invoices](#)

Contract Invoice Information

Consultant Name: Project Description: county line	FEIN/Loc: County: Clark	PO Number: Contract Project Number:	Invoice ID: Status Date: 07/28/2014
---	-------------------------------	--	---

2 * Indicates required field

Final Invoice: *
 Yes No

Consultant Invoice Number: *

Time Period Covered by this Invoice:

Start Date: * **End Date:** *

Consultant Contact:

Name: * **Phone:** * **Email:** *

3 [Save](#) [Cancel](#)

Actual Cost

DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services [Edit](#)



Consultants: Add Costs for Actual Cost Contracts

If the terms for the contract you are invoicing specify payments based on actual costs (also called “cost plus”), you can add these costs in the **Actual Cost** section.

If needed, create a new invoice using the instructions in *Create a New Invoice* on page 69.

1. Click **Edit** in the **Actual Cost** section.

If this is the first invoice for a project or contract, CARS asks for previously paid amounts that were paid outside of CARS for this contract. See *Consultants: First Invoice in CARS Question* on page 107 for details.

2. Answer the “prior invoices” question, and then click **Save**. CARS opens the *Actual Cost Contract Items* page.

View Invoice Back to Dashboard Delete Invoice View Paid Invoices

Contract Invoice Information

Consultant Name: Osage FEIN/Loc: 987654321/0 PO Number: Invoice ID: 21

State Project ID: 0751-32-58 Master Contract ID: Work Order: Status: Draft

Consultant Contact:

Name: Felicity Schreiber Phone: 608-811-4597 Email: fschreiber@osage.com

Edit

Actual Cost 1 Edit

DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services

Actual Costs

Incurred This Invoice:	0.00
Previously Incurred:	0.00
Incurred to Date:	0.00



Add Direct Labor

1. Click **Add Direct Labor** on the *Actual Cost Contract Items* page. CARS opens the *Add/Edit Direct Labor* page.
2. Enter the employee name in the 2 employee name fields.
3. If your firm requires an employee number, enter it in the **Employee Number** field.
4. Enter the employee job function as defined by your firm in the **Employee Classification** field. This field is limited to 50 characters.
5. If your firm has the option, select the type of hours the employee worked in the **Hours Type** field. Two types are allowed: “Hours Worked” and “Premium Pay”. Most firms report only regular hours, and the value in this field is automatically set to “Hours Worked”.
6. Enter the number of hours the employee worked during the period for which you are invoicing in the **Hours** field. This time period is not limited by the **Start Date** and **End Date** you entered in the *Consultant Invoice Information* (page 70). You can enter up to two decimal places.

Note: You can invoice for other time periods, provided you enter the information as another line item.

Actual Cost Contract Items

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services ← Back

Previous Paid External: 0.00 Previous Paid Fixed Fee External: 0.00 ✎ Edit Previous Paid

Direct Labor and Overhead 1

Nothing found to display. Total Labor: \$0.00 + Add Direct Labor

Indirect Costs

Nothing found to display. Total Indirect Cost: \$0.00 + Add Indirect Cost

Direct Costs

Nothing found to display. Total Direct Cost: \$0.00 + Add Direct Cost

Total Cost: \$0.00

Fixed Fee

Percent Complete: % Fixed Fee Amount: 11,700.00 Total Fixed Fee: \$0.00

Save Fixed Fee Reset

Add/Edit Direct Labor ← Back/Cancel

* Indicates required field

2 **Employee First Name: *** Adrian

Employee Last Name: * Miller

3 **Employee Number:** M6768

4 **Employee Classification: *** General Labor

5 **Hours Type: *** Hours Worked

6 **Hours: *** 40

7 **Activity: *** 108-General Field Work

8 **Calendar Month of Labor: *** 05 May

9 **Calendar Year of Labor: *** 2014

10 **Indirect Cost Rate Type:** Home Office

11 **Labor Cost: *** 615.00

12 Save



Add Direct Labor - continued

7. Select a type of work in the **Activity** field.

Note: Activity codes are defined in the FDM in [chapter 8, section 10-1](#), attachment 1.3.

8. Select the month the work was done in the **Calendar Month of Labor** field.
9. Enter the year the work was done in the **Calendar Year of Labor** field.
10. Select the predefined rate type in the **Indirect Cost Rate Type** field.

Note: Selecting a rate type here determines rate applied in the **Indirect Costs** section, if overhead applies. Overhead rates are subject to updates.


11. Enter the cost of this employee's work in the **Labor Cost** field.
12. Click **Save**. CARS saves the labor cost and lists the details on the *Actual Cost Contract Items* page. CARS also displays the message, "Direct Labor saved successfully".
13. Click **Back/Cancel** to return to the *Actual Cost Contract Items* page.

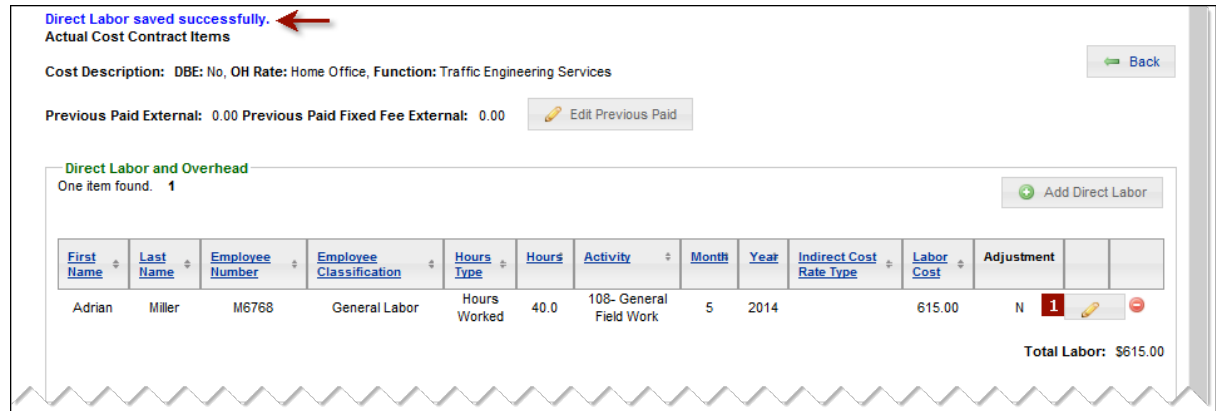
The screenshot shows a web form titled "Add/Edit Direct Labor" with a "Back/Cancel" button in the top right. A note at the top left states "* Indicates required field". The form contains the following fields, each with a red callout box and number:


- 2. Employee First Name: * (text input: Adrian)
- Employee Last Name: * (text input: Miller)
- 3. Employee Number: * (text input: M6768)
- 4. Employee Classification: * (text input: General Labor)
- 5. Hours Type: * (dropdown menu: Hours Worked)
- 6. Hours: * (text input: 40)
- 7. Activity: * (dropdown menu: 108-General Field Work)
- 8. Calendar Month of Labor: * (dropdown menu: 05 May)
- 9. Calendar Year of Labor: * (text input: 2014)
- 10. Indirect Cost Rate Type: * (dropdown menu: Home Office)
- 11. Labor Cost: * (text input: 615.00)
- 12. Save (button)




Edit Actual Labor Costs

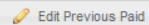
1. Locate the appropriate line on the *Actual Cost Contract Items* page and click **Edit Direct Labor**  on that line. CARS opens the *Add/Edit Direct Labor* page.
2. Make the necessary updates to the data fields described in *Add Direct Labor* on page 74.
3. Click **Save**.

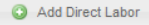




Direct Labor saved successfully. 

Actual Cost Contract Items

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services 


Previous Paid External: 0.00 Previous Paid Fixed Fee External: 0.00 

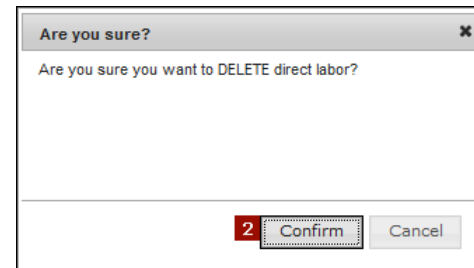
Direct Labor and Overhead
One item found. 1 


First Name	Last Name	Employee Number	Employee Classification	Hours Type	Hours	Activity	Month	Year	Indirect Cost Rate Type	Labor Cost	Adjustment		
Adrian	Miller	M6768	General Labor	Hours Worked	40.0	108- General Field Work	5	2014		615.00	N	1  	

Total Labor: \$615.00

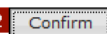

Delete Actual Labor Costs

1. Locate the appropriate line on the *Actual Cost Contract Items* page and click **Delete Direct Labor**  on that line. CARS displays an *Are you sure?* message.
2. Click **Confirm**. CARS deletes the direct labor cost.



Are you sure? 

Are you sure you want to DELETE direct labor?

2  



Add Direct Costs

1. Click **Add Direct Cost** on the *Actual Cost Contract Items* page. CARS opens the *Add/Edit Indirect Cost* page.
2. Select a predefined cost type in the **Category** field.
3. Enter a description of the specific cost in the **Description** field.
4. Select a payment recipient type in the **Paid To Type** field.
 - Select “Internal Allocation” for project-related costs incurred by your firm, such as equipment or supplies.
 - Select “Payment” for amounts paid to business service providers, such as analytical services, shipping and postage, or travel and meal expenses.
5. Enter the name of the external business service provider in the **Payee Name** field. This field is required when the value in the **Paid To Type** field is “Payment”.
6. Enter the quantity of items or other measure for this cost in the **Units** field.
7. Enter the cost per unit in the **Unit Rate** field. This field is required when the **Units** field is not empty.



Add Direct Costs - continued

8. Enter a brief explanation of the units used to describe the cost in the **Unit Description** field. This field is required when the **Units** field is not empty.
9. Select the month the cost was incurred in the **Calendar Month of Costs** field.
10. Enter the year the cost was incurred in the **Calendar Year of Costs** field.
11. If your firm has the option, select an indirect cost type in the **Indirect Cost Rate Type** field if an indirect rate applies to this cost. Most firms cannot apply indirect cost rates to direct costs.
12. Enter the total cost in the **Direct Cost** field. You can enter this value or have CARS calculate it.
13. Click **Calculate** if you want CARS to calculate the value for Units × Unit Rate.
14. Click **Save**. CARS saves the direct cost and lists the details on the *Actual Cost Contract Items* page. CARS also displays the message, “Direct Cost saved successfully”.

Add/Edit Direct Cost

* Indicates required field

2 Category: * Vehicle Rental & Fuel	3 Description: * 4WD Truck	4 Paid To Type: * Payment
5 Payee Name: (Required if Paid To Type is 'Payment') Safari Outfitters	6 Units: 5	7 Unit Rate: (Required if Units entered) 65.18
8 Unit Description: (Required if Units entered) Days	9 Calendar Month of Costs: * 05 May	10 Calendar Year of Costs: * 2014
11 Indirect Cost Rate Type: Home Office	12 Direct Cost: * 325.90	13 Calculate


Enter direct cost above or hit Calculate to use units and rate.

14 Save


Back/Cancel




Edit Direct Costs

1. Locate the appropriate line on the *Actual Cost Contract Items* page and click **Edit Direct Cost**  on that line. CARS opens the *Add/Edit Direct Cost* page.
2. Make the necessary updates to the data fields described in *Add Direct Labor* on page 74.
3. Click **Save**.

Delete Direct Costs

1. Locate the appropriate line on the *Actual Cost Contract Items* page and click **Delete Direct Cost**  on that line. CARS displays an *Are you sure?* message.
2. Click **Confirm**. CARS deletes the direct cost.

Direct Cost saved successfully. 



Actual Cost Contract Items

Cost Description: DBE: No, OH Rate: Home Office, Function: Construction Services Back

Previous Paid External: 0.00 Previous Paid Fixed Fee External: 0.00 Edit Previous Paid

Direct Labor and Overhead
One item found. 1 Add Direct Labor

Direct Costs
One item found. 1 Add Direct Cost

Category	Description	Paid To Type	Payee Name	Units	Unit Rate	Unit Description	Month	Year	Indirect Cost Rate Type	Direct Cost	Adjustment	
Vehicle Rental & Fuel	4WD Truck	Payment	Safari Outfitters	5.00	65.18	Days	5	2014	Home Office	325.90	N	1  

Total Direct Cost: \$325.90

Total Cost: \$940.90

Are you sure?

Are you sure you want to DELETE direct cost?

2 Confirm Cancel



Indirect Costs

Indirect costs are typically overhead costs, which are commonly applied only to direct labor costs. CARS automatically generates indirect cost lines for your invoices based on cost type (direct labor or direct cost), the month and year of the cost, and the indirect cost rate type (such as “Home Office” or “Field Office”). Indirect costs generated by CARS are not editable. The rates for each firm and indirect cost type are maintained in CARS by the DTSD Audit and Contract Administration Section. The details for indirect costs shown on the *Actual Cost Contract Items* page are described below.

1. CARS totals indirect costs based on cost type, date, and cost rate type, and inserts a single line in the **Indirect Costs** section. In this example, the four lines shown in the **Direct Labor** section that were reported for March 2015 and should have the “Home Office” indirect cost rate applied are combined into one line item in the **Indirect Costs** section (marked “1”).
2. CARS lists costs that have a different cost rate type separately in the **Indirect Costs** section.
3. CARS lists costs that have a different date (month or year) separately.

Indirect Cost saved successfully.
Actual Cost Contract Items
 Cost Description: DBE: Yes, OH Rate: Home Office, Function: Traffic Counts

Previously Invoiced External: 0.00 Previously Invoiced Fixed Fee External: 0.00 [Edit Previous Paid](#)

Direct Labor
 6 items found, displaying all items. 1 [Add Direct Labor](#)

First Name	Last Name	Employee Number	Employee Classification	Hours Type	Hours	Activity	Month	Year	Indirect Cost Rate Type	Labor Cost	Adjustment			
Patty	Green	G334	Technician	Hours Worked	40.0	108- General Field Work	1	3	2015	Home Office	800.00	N		
Carl	Petersen	P875	Technician	Hours Worked	40.0	108- General Field Work	3	2015	Home Office	800.00	N			
Calvin	Li	L345	Project Manager	Hours Worked	40.0	104- Project Supervision	3	2015	Home Office	1,200.00	N			
Mark	Halperin	H545	Technician PT	Hours Worked	25.0	109- General Shop Work	3	2015	Home Office	625.00	N			
Leonard	Miller	M121	Field Technician	Hours Worked	40.0	108- General Field Work	2	3	2015	Field Office	700.00	N		
Paul	McDougal	M987	Office Manager	Hours Worked	40.0	107- General Office Work	3	4	2015	Home Office	900.00	N		
Total Labor:											\$5,025.00			

Direct Costs
 2 items found, displaying all items. 1 [Add Direct Cost](#)

Category	Description	Paid To Type	Payee Name	Units	Unit Rate	Unit Description	Month	Year	Indirect Cost Rate Type	Direct Cost	Adjustment			
Traffic Counting Equipment	tubes	Payment	Acme supplies	6.00	65.0	20 ft pressure tubes	3	2015	Field Office	390.00	N			
Company vehicle mileage	Car W1845	Internal Allocation		62.70	0.55	miles	3	2015		34.49	N			
Total Direct Cost:											\$424.49			

Indirect Costs
 5 items found, displaying all items. 1 [Add Indirect Cost](#)

Costs Subject to Indirect Cost Rate	Description	Month	Year	Indirect Cost Rate Type	Rate	Indirect Cost	Adjustment			
5	325.00	Premium Increase	3	2015	Home Office	1.85	601.25	N		
2	700.00	Calculated Labor Cost	3	2015	Field Office	1.825	1,277.50			
1	3,425.00	Calculated Labor Cost	3	2015	Home Office	1.85	6,336.25			
3	900.00	Calculated Labor Cost	4	2015	Home Office	1.85	1,665.00			
4	390.00	Calculated Direct Cost	3	2015	Field Office	1.825	711.75			
Total Indirect Cost:							\$10,591.75			

Fixed Fee
 Percent Complete: 30 % Fixed Fee Amount: 15,000.00 **Total Fixed Fee: \$4,500.00**

[Save Fixed Fee](#) [Reset](#)

Total Cost: \$16,041.24



Indirect Costs - continued

4. CARS lists costs having different cost types separately, such as direct labor and direct costs. Most firms do not apply an indirect cost rate to direct costs.
5. Costs added manually are listed separately and can be edited. Most firms do not add indirect costs manually. CARS lists costs having different cost types separately, such as direct labor and direct costs. Most firms do not apply an indirect cost rate to direct costs.
6. Costs added manually are listed separately and can be edited. Most firms do not add indirect costs manually.

Indirect Cost saved successfully.
Actual Cost Contract Items
 Cost Description: DBE: Yes, OH Rate: Home Office, Function: Traffic Counts ← Back

Previously Invoiced External: 0.00 Previously Invoiced Fixed Fee External: 0.00 ✎ Edit Previous Paid

Direct Labor
 6 items found, displaying all items. 1 ➕ Add Direct Labor

First Name	Last Name	Employee Number	Employee Classification	Hours Type	Hours	Activity	Month	Year	Indirect Cost Rate Type	Labor Cost	Adjustment			
Patty	Green	G334	Technician	Hours Worked	40.0	108- General Field Work	1	3	2015	Home Office	800.00	N		
Carl	Petersen	P875	Technician	Hours Worked	40.0	108- General Field Work	3	2015	Home Office	800.00	N			
Calvin	Li	L345	Project Manager	Hours Worked	40.0	104- Project Supervision	3	2015	Home Office	1,200.00	N			
Mark	Halperin	H545	Technician PT	Hours Worked	25.0	109- General Shop Work	3	2015	Home Office	625.00	N			
Leonard	Miller	M121	Field Technician	Hours Worked	40.0	108- General Field Work	2	3	2015	→ Field Office	700.00	N		
Paul	McDougal	M987	Office Manager	Hours Worked	40.0	107- General Office Work	3	4	2015	Home Office	900.00	N		
Total Labor:											\$5,025.00			

Direct Costs
 2 items found, displaying all items. 1 ➕ Add Direct Cost

Category	Description	Paid To Type	Payee Name	Units	Unit Rate	Unit Description	Month	Year	Indirect Cost Rate Type	Direct Cost	Adjustment			
Traffic Counting Equipment	tubes	Payment	Acme supplies	6.00	65.0	20 ft pressure tubes	3	2015	Field Office	390.00	N			
Company vehicle mileage	Car W1845	Internal Allocation		62.70	0.55	miles	3	2015		34.49	N			
Total Direct Cost:											\$424.49			

Indirect Costs
 5 items found, displaying all items. 1 ➕ Add Indirect Cost

Costs Subject to Indirect Cost Rate	Description	Month	Year	Indirect Cost Rate Type	Rate	Indirect Cost	Adjustment			
5 325.00	Premium Increase	3	2015	Home Office	1.85	601.25	N			
2 700.00	Calculated Labor Cost	3	2015	Field Office	1.825	1,277.50				
1 3,425.00	Calculated Labor Cost	3	2015	Home Office	1.85	6,336.25				
3 900.00	Calculated Labor Cost	4	2015	Home Office	1.85	1,665.00				
4 390.00	Calculated Direct Cost	3	2015	Field Office	1.825	711.75				
Total Indirect Cost:							\$10,591.75			

Total Cost: \$16,041.24

Fixed Fee
 Percent Complete: 30 % **Fixed Fee Amount: 15,000.00** **Total Fixed Fee: \$4,500.00**



Manually Add Indirect Costs

Consultants who use “General and Administrative” (G&A) as one of their indirect cost types must add these costs manually. Only these consultants have the ability to add indirect costs manually using the steps described below.

1. Click **Add Indirect Cost** on the *Actual Cost Contract Items* page. CARS opens the *Add/Edit Indirect Cost* page.
2. Enter the indirect cost in the **Costs Subject to Indirect Cost Rate** field.
3. Enter a description of the indirect cost in the **Description** field.
4. Select the month the work was done in the **Calendar Month of Costs** field.
5. Enter the year the work was done in the **Calendar Year of Costs** field.

Actual Cost Contract Items

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services

Previous Paid External: 0.00 Previous Paid Fixed Fee External: 0.00

Indirect Costs

Nothing found to display.

Total Indirect Cost: \$0.00

Add/Edit Indirect Cost

* Indicates required field

2 Costs Subject to Indirect Cost Rate: * 3 Description: *

4 Calendar Month of Costs: * 5 Calendar Year of Costs: * 6 Indirect Cost Rate Type: *

7 Save



Manually Add Indirect Costs - continued

6. Select the cost rate type in the **Indirect Cost Rate Type** field if your firm can apply indirect rates to these costs. This is rare.

Note: For information about indirect cost rates, see the Facilities Development Manual (FDM) in [Chapter 8, Section 10-30](#).

7. Click **Save**. CARS saves the labor cost and lists the details on the *Actual Cost Contract Items* page.

Actual Cost Contract Items

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services

Previous Paid External: 0.00 Previous Paid Fixed Fee External: 0.00

Indirect Costs

Nothing found to display.

Total Indirect Cost: \$0.00

Add/Edit Indirect Cost

* Indicates required field

2 Costs Subject To Indirect Cost Rate: * 3 Description: *

4 Calendar Month of Costs: * 5 Calendar Year of Costs: * 6 Indirect Cost Rate Type: *

7 Save



Add Fixed Fee

Fixed fees are based on the percentage of the contract work that is completed. The percent complete (progress) should be calculated using one of the following formulas:

$$\frac{\text{Total Direct Labor Invoiced} + \text{Total Overhead Invoiced}}{\text{Total Estimated Contract Direct Labor} + \text{Total Estimated Contract Overhead}} \times 100\%$$

OR

$$\frac{\text{Total Direct Labor Invoiced}}{\text{Total Estimated Contract Direct Labor}} \times 100\%$$

CARS calculates the fixed fee due as a percentage of the fixed fee stated in the contract. For example, if the fixed fee on Contract A is \$1000 and the work is 52% complete, then the fixed fee due is \$520.

Previously paid amounts are subtracted on the invoice. For the second invoice for Contract A, if the percent complete is 79%, the fixed fee due is \$790. The invoice will show earned to date = \$790, minus previously paid \$520, resulting in fixed fee due = \$270.

1. Enter the progress of the contract work in the **Percent Complete** field.
2. Click **Save Fixed Fee**. CARS calculates the amount due and adds it to the *Actual Cost Contract Items* page.

Fixed Fee		
1	Percent Complete: 25.0 %	Fixed Fee Amount: 11,700.00
		Total Fixed Fee: \$0.00
2	Save Fixed Fee	Reset

Note: Click **Reset** to change the percent complete value back to the last saved value.

3. Click **Back** to view the invoice. The previously paid amounts are shown in the **Actual Cost** section under "Fixed Fee".



Consultants: Add Costs for Cost Per Unit Contracts

If the terms in the contract you are invoicing specify payments based on cost per unit, you can add these costs in the **Cost Per Unit** section.

If needed, create a new invoice using the instructions in *Create a New Invoice* on page 69.

1. Click **Edit** in the **Cost Per Unit** section.

If this is the first invoice for a project or contract, CARS asks for previously paid amounts that were paid outside of CARS for this contract.

See *Consultants: First Invoice in CARS Question* on page 107 for details.

2. Answer the “prior invoices” question, and then click **Save**. CARS opens the *Actual Cost Contract Items* page.
3. Enter the total amount to invoice in the **Cost Per Unit Amount** field.
4. Click **Save Cost Per Unit**.

Note: Click **Reset** to revert the cost per unit amount to the previous value, provided you have not yet clicked **Save Cost Per Unit**.

5. Click **Back** to view the invoice.

Cost Per Unit Contract Item

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Analysis Services

Previous Paid External: 0.00 [Edit Previous Paid](#)

Cost Per Unit

Cost Per Unit Amount:

[Save Cost Per Unit](#) [Reset](#) [Back](#)



Consultants: Add Costs for Lump Sum Contracts

If the terms in the contract you are invoicing specify payments based on a lump sum, you can add these costs in the **Lump Sum** section.

Lump sum percent complete (progress) is based on the same formulas as an actual cost fixed fee.

$$\frac{\text{Total Direct Labor Invoiced} + \text{Total Overhead Invoiced}}{\text{Total Estimated Contract Direct Labor} + \text{Total Estimated Contract Overhead}} \times 100\%$$

OR

$$\frac{\text{Total Direct Labor Invoiced}}{\text{Total Estimated Contract Direct Labor}} \times 100\%$$

If needed, create a new invoice using the instructions in *Create a New Invoice* on page 69.

1. Click **Edit** in the **Lump Sum** section.

If this is the first invoice for a project or contract, CARS asks for previously paid amounts that were paid outside of CARS for this contract. See *Consultants: First Invoice in CARS Question* on page 107 for details.

2. Answer the “prior invoices” question, and then click **Save**. CARS opens the *Lump Sum Contract Item* page.
3. Enter the progress of the contract work in the **Percent Complete** field.
4. Click **Save Lump Sum**.

Note: Click **Reset** to revert the lump sum amount to the previous value, provided you have not yet clicked **Save Lump Sum**.

5. Click **Back** to view the invoice.

Lump Sum Contract Item

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services

Previous Paid External: 0.00 [Edit Previous Paid](#)

Lump Sum

6 Percent Complete: % Contract Amount: 52,430.00 Total Lump Sum: \$0.00

7 [Save Lump Sum](#) [Reset](#) [Back](#)



Consultants: Add Costs for Specific Rate Contracts

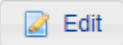
If the terms for the contract you are invoicing specify payments based on specific rates, you can add these costs in the **Specific Rate** section.

If needed, create a new invoice using the instructions in *Create a New Invoice* on page 69.

1. Click **Edit** in the **Specific Rate** section.

If this is the first invoice for a project or contract, CARS asks for previously paid amounts that were paid outside of CARS for this contract. See *Consultants: First Invoice in CARS Question* on page 107 for details.

2. Answer the “prior invoices” question, and then click **Save**. CARS opens the *Specific Rate of Compensation Contract Items* page.

Specific Rate 1 

DBE: No, OH Rate: Home Office, Function: Design Services

Incurring This Invoice:	0.00	
Previously Incurred:	0.00	

Incurring to Date:	0.00	
Contract Maximum:	10,000.00	
Subject to Maximum:		0.00
Previously Paid:		0.00

Specific Rate Due:		0.00
Total Specific Rate Due:		\$0.00



Add Direct Labor

1. Click **Add Direct Labor**. CARS opens the *Add/Edit Direct Labor* page.
2. Enter the employee name in the 2 employee name fields.
3. If your firm requires an employee number, enter it in the **Employee Number** field.
4. Enter the employee job function as defined by your firm in the **Employee Classification** field. This field is limited to 50 characters.
5. If your firm has the option, select the type of hours the employee worked in the **Hours Type** field. Two types are allowed: “Hours Worked” and “Premium Pay”. Most firms report only hours worked, and the value in this field is automatically set to “Hours Worked”.
6. Enter the number of hours the employee worked during the period for which you are invoicing in the **Hours** field. This time period is not limited by the **Start Date** and **End Date** you entered in the Consultant Invoice Information when you created the invoice (page 70). You can enter time values with up to two decimal places.
7. Select a type of work in the **Activity** field.

Note: Activity codes are defined in the FDM in [Chapter 8, Section 10-1](#), attachment 1.3.

Specific Rate of Compensation Contract Items ← Back

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services

Previous Paid External: 2,400.00 ✎ Edit Previous Paid

Direct Labor and Overhead 1

Nothing found to display. Total Labor: \$0.00 + Add Direct Labor

Direct Costs

Nothing found to display. Total Direct Cost: \$0.00 + Add Direct Cost

Total Cost: \$0.00

Add/Edit Direct Labor ← Back/Cancel

* Indicates required field

2 Employee First Name: *
Mikolaj

Employee Last Name: *
Czajkowski

3 Employee Number:
C4568

4 Employee Classification: *
General Field Worker

5 Hours Type: *
Hours Worked

6 Hours: *
80

7 Activity: *
108-General Field Work

8 Calendar Month of Labor: *
06 Jun

9 Calendar Year of Labor: *
2014

10 Labor Cost: *
1200

1.1 Save



Add Direct Labor - continued

8. Select the month the work was done in the **Calendar Month of Labor** field.
9. Enter the year the work was done in the **Calendar Year of Labor** field.
10. Enter the cost of this employee's work in the **Labor Cost** field.
11. Click **Save**. CARS saves the labor cost and lists the details on the *Specific Rate of Compensation Contract Items* page.

The screenshot shows a web form titled "Add/Edit Direct Labor" with a "Back/Cancel" button in the top right. The form contains several input fields, each with a red box and a number indicating a step in the process:

- 1. A red box highlights the "Save" button at the bottom left.
- 2. A red box highlights the "Employee First Name" field containing "Mikolaj".
- 3. A red box highlights the "Employee Last Name" field containing "Czajkowski".
- 4. A red box highlights the "Employee Number" field containing "C4568".
- 5. A red box highlights the "Employee Classification" field containing "General Field Worker".
- 6. A red box highlights the "Hours Type" dropdown menu, which is currently set to "Hours Worked".
- 7. A red box highlights the "Hours" field containing "80".
- 8. A red box highlights the "Activity" dropdown menu, which is currently set to "108-General Field Work".
- 9. A red box highlights the "Calendar Month of Labor" dropdown menu, which is currently set to "06 Jun".
- 10. A red box highlights the "Calendar Year of Labor" field containing "2014".
- 11. A red box highlights the "Labor Cost" field containing "1200".

A legend at the top left of the form indicates that an asterisk (*) denotes a required field.



Add Direct Cost

1. Click **Add Direct Cost**. CARS opens the *Add/Edit Direct Cost* page.
2. Select a predefined cost type in the **Category** field.
3. Enter a description of the specific cost in the **Description** field.
4. Select a payment recipient type in the **Paid To Type** field.
 - Select “Internal Allocation” for project-related costs incurred by your firm, such as equipment or supplies.
 - Select “Payment” for amounts paid to business service providers, such as analytical services or travel expenses.
5. Enter the name of the external business service provider in the **Payee Name** field. This field is required when the value in the **Paid To Type** field is “Payment”.
6. Enter the quantity of items or other measure for this cost in the **Units** field.
7. Enter the cost per unit in the **Unit Rate** field. This field is required when the **Units** field is not empty.
8. Enter a brief explanation of the units used to describe the cost in the **Unit Description** field. This field is required when the **Units** field is not empty.

Direct Labor saved successfully.
Specific Rate of Compensation Contract Items

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services ← Back

Previous Paid External: 2,400.00 ✎ Edit Previous Paid

Direct Labor and Overhead
One item found. 1 ➕ Add Direct Labor

First Name	Last Name	Employee Number	Employee Classification	Hours Type	Hours	Activity	Month	Year	Labor Cost	Adjustment		
Mikolaj	Czajkowski	C4568	General Field Worker	Hours Worked	80.0	108- General Field Work	6	2014	1,200.00	N	✎	⊖

Total Labor: \$1,200.00

Direct Costs
Nothing found to display. 1 Total Direct Cost: \$0.00 ➕ Add Direct Cost

Total Cost: \$1,200.00

Add/Edit Direct Cost ← Back/Cancel

* Indicates required field

2 **Category:** * Traffic Counting Equipment

3 **Description:** * Counter Rental

4 **Paid To Type:** * Payment

5 **Payee Name:** (Required if Paid To Type is 'Payment') Yale Rentals

6 **Units:** 4

7 **Unit Rate:** (Required if Units entered) \$75.99

8 **Unit Description:** (Required if Units entered) weekly rate/counter

9 **Calendar Month of Costs:** * 06 Jun

10 **Calendar Year of Costs:** * 2014

11 **Direct Cost:** * 2303.96

12 **Calculate**
Enter direct cost above or hit Calculate to use units and rate.

13 **Save**



Add Direct Cost - continued

- 9. Select the month the cost was incurred in the **Calendar Month of Costs** field.
- 10. Enter the year the cost was incurred in the **Calendar Year of Costs** field.
- 11. Enter the total cost in the **Direct Cost** field. You can enter this value or have CARS calculate it.
- 12. Click **Calculate** if you want CARS to calculate the value for the direct cost (Units × Unit Rate).
- 13. Click **Save**. CARS saves the direct cost and lists the details on the *Actual Cost Contract Items* page.
- 14. Click **Back/Cancel** to return to the *Actual Cost Contract Items* page.

The screenshot shows a web form titled "Add/Edit Direct Cost" with a "Back/Cancel" button in the top right. The form contains several input fields and buttons, each with a red box and a number indicating a step in the process:

- 2** Category: * (Dropdown menu with "Traffic Counting Equipment" selected)
- 3** Description: * (Text input field with "Counter Rental")
- 4** Paid To Type: * (Dropdown menu with "Payment" selected)
- 5** Payee Name: (Required if Paid To Type is 'Payment') (Text input field with "Yale Rentals")
- 6** Units: (Text input field with "4")
- 7** Unit Rate: (Required if Units entered) (Text input field with "575.99")
- 8** Unit Description: (Required if Units entered) (Text input field with "weekly rate/counter")
- 9** Calendar Month of Costs: * (Dropdown menu with "06 Jun" selected)
- 10** Calendar Year of Costs: * (Text input field with "2014")
- 11** Direct Cost: * (Text input field with "2303.96")
- 12** Calculate (Button)
- 13** Save (Button)

Below the "Calculate" button, there is a note: "Enter direct cost above or hit Calculate to use units and rate."



Upload Supporting Invoice Documents

CARS can associate supporting documents with the invoice. These documents include any required documentation, such as receipts and subcontract correspondence. Use the document management tool to upload documents and to access copies of invoices that CARS generates automatically.

- The Invoice Editor or Invoice Submitter roles for prime or subcontracts are required in order to upload documents.
- CARS accepts only PDF documents for storage.
 - To create PDF documents from existing Microsoft Office documents, save as a PDF. For optimum compatibility with CARS, save as PDF/A. If you have Adobe Acrobat, you can convert a “regular” PDF document to the PDF/A subset. See [Appendix 15: Save Invoice Documents as PDF/A](#) for details.
 - To save any printable file as a PDF, print to PDF.
 - To make a PDF file of hard copy receipts or subcontractor invoices, scan the pages and save the scanned image as a PDF, or take a photo with a smart phone and email a PDF copy to an accessible email account.

Note: The document manager currently handles one document at a time. Firms who have Adobe Acrobat® may combine supporting documents as a single file for upload.

1. On the *Dashboard* page in the **Invoices** section, select the appropriate invoice.
2. On the *View Invoice* page, scroll to the bottom of the page to the **Upload Documents** section and click **Upload Documents**. CARS opens the *Upload Documents* page.

View Invoice [← Back to Dashboard](#) [← Back to Contract](#) [Delete Invoice](#) [View Paid Invoices](#)

▼ **Contract Invoice Information**

Consultant Name: Able Engineering FEIN/Loc: 888888888/0 PO Number: Invoice ID: 1610

2 [Upload Documents](#)

Upload Documents

No items found. 1

Document Description	Created Date
Nothing found to display.	

No items found. 1

Consultant Certification



Upload Supporting Invoice Documents - continued

3. Click **Browse**.
4. Navigate to the document on your local computer and select it in the list of files.
5. Click **Open**.
6. Enter a brief description in the **Document Description** field.
7. Click **Upload**. CARS displays the message “Document uploaded successfully” when the upload is complete. You can now upload more documents.
8. When the upload is complete, click **Back** to return to the *View Invoice* page. The uploaded document is listed in the **Upload Documents** section.

Delete Uploaded Supporting Invoice Document

To delete one of the documents you uploaded, click **Delete** in the **Upload Documents** table for the appropriate document.

You cannot delete CARS-generated documents, such as copies of invoices that are created upon submittal.



Upload Documents

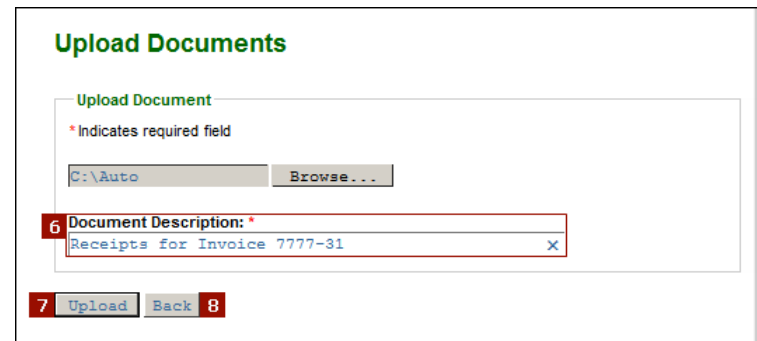
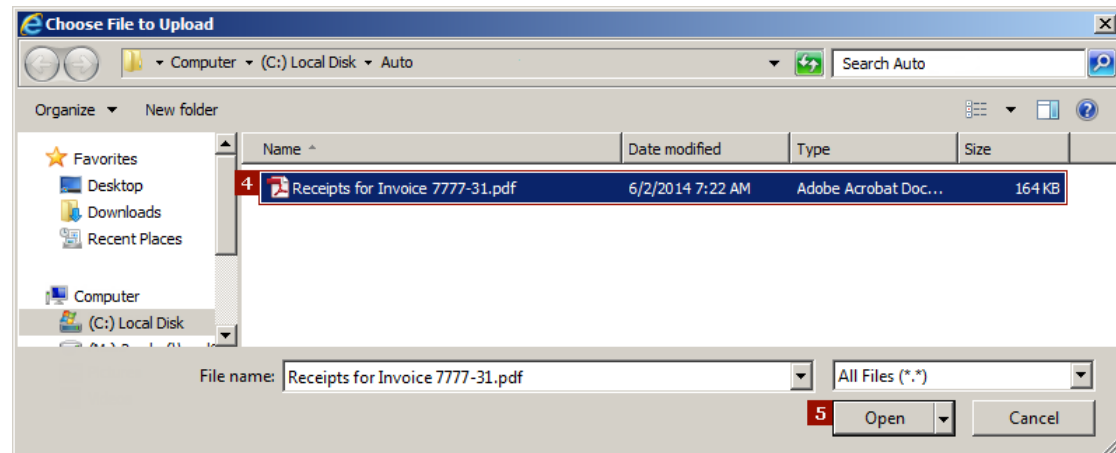
Upload Document

* Indicates required field

3 Browse...

Document Description: * **6**

7 Upload **8** Back



Upload Documents

Upload Document

* Indicates required field

C:\Auto Browse...

6 Document Description: *

Receipts for Invoice 7777-31

7 Upload **8** Back



Download Supporting Invoice Documents

Documents saved in CARS can have 3 sources:

- Consultant upload
- WisDOT upload
- CARS-generated

All document saved in CARS are PDF files. WisDOT users can transfer documents from CARS to the LAN directory for saving in eClient.

CARS combines all documents attached to an invoice when the invoice is submitted into a single PDF, including subconsultant documentation and submitted invoices.

1. In the **Upload Documents** section, click the link in the **Document Description** column. CARS opens the *View Invoice Document* page.
2. Click **Download**. CARS opens the document in a new Internet Explorer window.

Upload Documents

3 items found, displaying all items. 1

Document Description	Created Date
1 Paid Partial invoice	August 08, 2014 10:57:56
Timesheet 7-14	August 08, 2014 07:14:43
Submitted Partial Invoice	August 07, 2014 13:04:05

3 items found, displaying all items. 1

PATWANE Project, Contract or Master Contract:


View Invoice Document

Invoice No: 633
Document Description: Paid Partial invoice
Created Date: Wed Aug 06 13:45:34 CDT 2014

[2 Download](#)



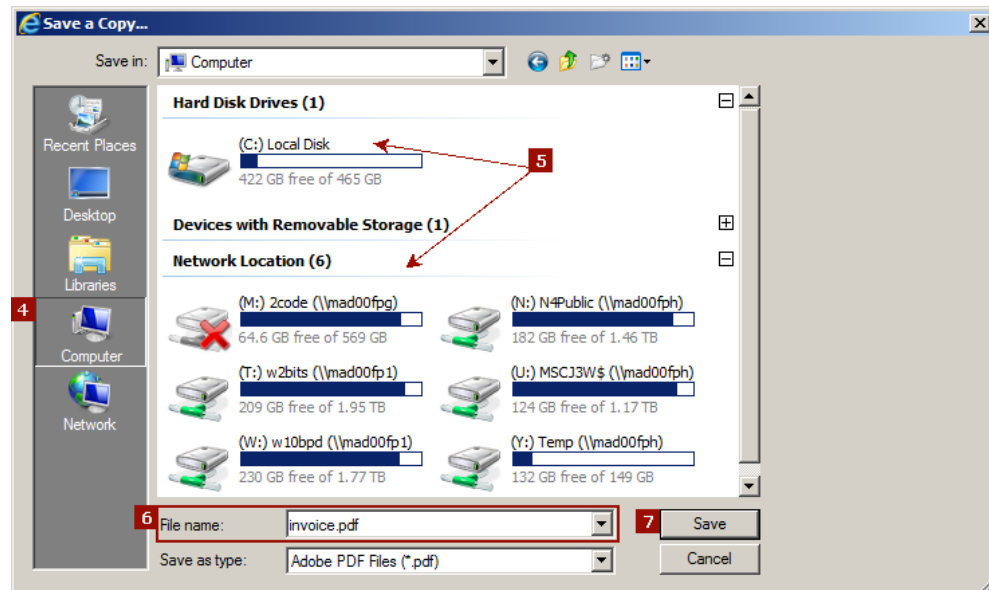
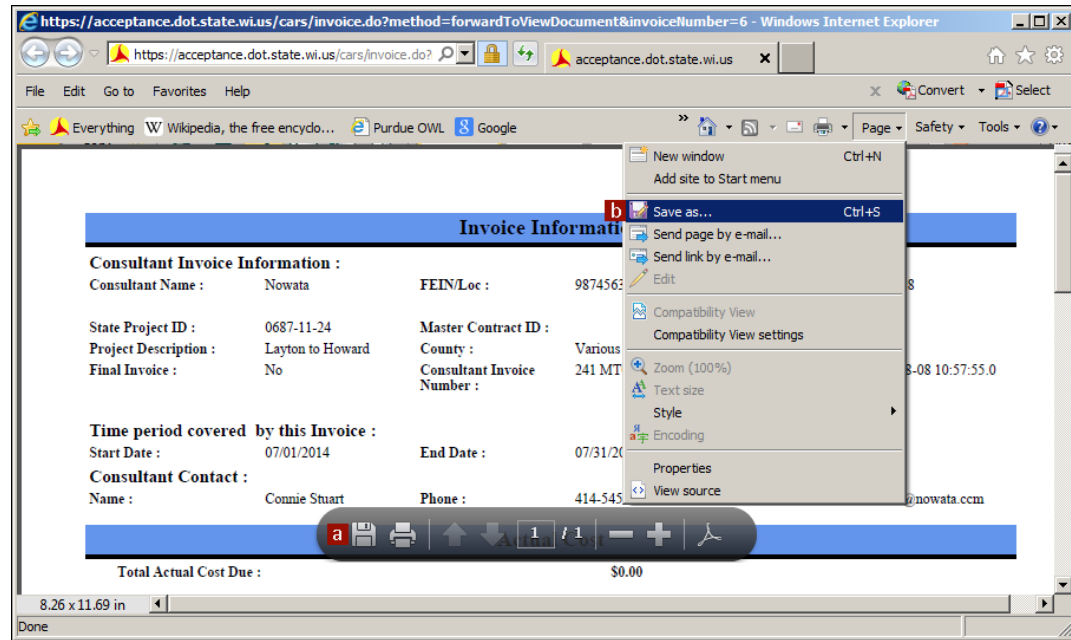
Download Supporting Invoice Documents - continued

3. Save the document to the appropriate drive location:
 - a. Hover your mouse pointer near the bottom of the page to use the Acrobat document menu, and then click **Save a copy** 
 - b. On the Internet Explorer **Page** menu, click **Save as...**

Note: You must have the Internet Explorer **Command** bar enabled to see this menu.

In either case, the system opens the **Save a Copy...** dialog box.

4. Click **Computer** in the left panel of the **Save a Copy...** dialog box.
5. Navigate to the location where you want to save the documents.
6. If needed, change the file name.
7. Click **Save**.



Consultants: Submit Invoices

When all costs are entered and all supporting documents are uploaded for the invoice, it is ready to be submitted for approval by WisDOT and subsequent payment. When you submit an invoice, CARS automatically generates a PDF copy and lists it in the **Upload Documents** section. The invoice is also sent to the contract Project Manager for review.

Submitted invoices are no longer listed on your dashboard. You can use two methods to view submitted and paid invoices: search for invoice to view invoices in any status, or click the **View Paid Invoices** button to view paid invoices only. See page 38 for instructions on searching for invoices.

- In the **Consultant Certification** section, click **Submit Invoice**. CARS sends the invoice to WisDOT and removes it from your dashboard.

CARS automatically sends email to specific WisDOT staff members notifying them that the invoice for this project has been submitted.

CARS also automatically notifies designated consultant staff members when the invoice for this project has been paid or rejected.



Consultant Certification

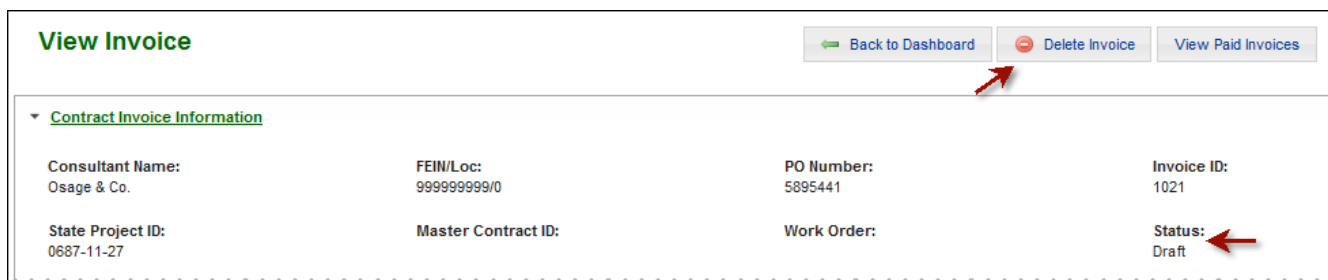
I certify that to the best of my knowledge the work as listed has been completed, represents no duplication of payments, and that all costs are in compliance with the contract terms.

[Submit Invoice](#)

Consultants: Delete Invoices

If an invoice is in “Draft” status, it can be deleted from the system. Once the invoice is submitted, it is part of the permanent records.

- On the *View Invoice* page, click **Delete Invoice**.



View Invoice

[← Back to Dashboard](#) [Delete Invoice](#) [View Paid Invoices](#)

▼ **Contract Invoice Information**

Consultant Name: Osage & Co.	FEIN/Loc: 999999999/0	PO Number: 5895441	Invoice ID: 1021
State Project ID: 0687-11-27	Master Contract ID:	Work Order:	Status: Draft



Consultants: Invoice Contracts with Subcontracts

When your company is the prime contractor for a contract, a subcontractor can create invoices using the same procedures as the prime contractor. However, when they submit the invoice, it is sent to the prime contractor, not to WisDOT. A subcontractor to a subcontractor submits invoices to the next higher tier for multi-tier contracts. Only the prime contractor submits invoices to WisDOT.

Subconsultant invoices are “included in” (attached to) a prime consultant’s invoice. If the prime consultant needs to submit only the subconsultant’s invoice, the prime creates an invoice with no costs for themselves, and then approves and includes the subconsultant’s invoice to forward the invoice to WisDOT. If the subconsultant has been paid outside CARS, the prime can create an invoice where the costs previously invoiced outside CARS amount match the costs detailed in the invoice; the costs previously paid outside CARS cancel the costs billed in the invoice. An invoice where the previously paid amounts exactly offset the billed costs for a net invoice amount of zero is called a “zero” invoice.

Subcontract Invoice Roles

To manage subcontract invoices, a subcontractor staff member must have the Subcontract Invoice Editor or Subcontract Invoice Submitter role. The subcontractor staff member who submits invoices to the higher tier contractor must have the Subcontract Invoice Submitter role.

Subcontractor Invoices on the Prime Contractor’s Dashboard

Prime contractors see subcontractor invoices listed on their *Dashboard* pages while the invoice is still in “Draft for Subcontract” status, but will not be able to open it from the *Dashboard* page. The letter “S” in the **Type** column and “Draft for Subcontract” in the **Status** column indicate that the invoice is for a subcontract. The letter “A” in the **Type** column and “Draft for Subcontract” in the **Status** column indicate that the invoice is for an amendment subcontract.

When the subcontractor submits the invoice, it is no longer listed on the *Dashboard* page for prime contractor or subcontractor.

Invoices								
10 items found, displaying all items. 1								
Project Id /Master /WO #	Type	Prime Vendor	Contact Name	Project Manager	Status	Consultant Invoice#	Created Date	Invoice Period
0098-10-02 /M00981001 /1	S	Osage & Co.	Ken Post	JC Lane	Draft for Subcontract	98-10-02Acmesub2	04/20/2015	03/01/2015 to 03/30/2015
0098-10-04 /M00981001 /4	S	Osage & Co.	Kate Soto	JC Lane	Draft for Subcontract	98-1004Amossub1AMD	04/20/2015	01/01/2015 to 03/30/2015
0098-10-05 /M00981001 /5	A	Osage & Co.	Lane Remy	JC Lane	Draft for Subcontract	98-10-05AblesubAMD	04/20/2015	01/01/2015 to 03/30/2015
0099-11-13		Osage & Co.	Max Brewer		Draft	Osg1113	03/12/2015	03/01/2015 to 03/14/2015

10 items found, displaying all items. 1



Consultants: Review and Include Subcontractor Invoices

Use this process to review invoices that subcontractors have submitted.

The invoice status for subcontractor-submitted invoices is “Submitted to Higher Tier”. Higher tier consultants can view and reject subcontract invoices, but they cannot make adjustments.

Note: If you have more than one invoice from the same subcontractant to include on your invoice, then attach, accept and include them in reverse chronological order. For example, include June’s invoice before you include May’s. The order does not affect what you see on the invoice in CARS, but important elements behind the scenes are not set correctly if you do not follow this rule.

1. Create a new invoice for the contract. See *Create a New Invoice* on page 69 for details.
2. In the **Sub Consultant Invoices** section, click **Accept/Include Invoices**. CARS opens the *Invoice Selection* page.
3. Click the invoice link in the **DOT Invoice ID** column for the appropriate invoice. CARS opens the *View Invoice* page for the subcontractor’s invoice. Note that both prime and subcontractor are listed on the invoice, and your name and firm are listed at the top of the page.

Sub Consultant Invoices

-Select- Create Invoice Accept/Include Invoices

Total Sub Invoices Included: \$0.00

Invoice Selection

One item found. 1

Invoice Type	Vendor Name	Status	DOT Invoice ID	Invoice Total			
S	77th Company	Submitted to Higher Tier	522	17500.00	Accept	Include	Reject

Back



Consultants: Review and Include Subcontractor Invoices - continued

4. Review the information on the invoice.
5. Click **Back to Include Invoice** to return to the prime contractor's invoice page.

The screenshot displays a web interface for viewing an invoice. At the top, a header bar shows 'JOHNKANE - John Kane processing on behalf of Osage' and a search field for 'Project, Contract or Master Contract:'. Below the header, the title 'View Invoice' is followed by a red box with the number '5' and two buttons: 'Back to Include Invoice' and 'Back to Dashboard'. A section titled 'Contract Invoice Information' contains the following details:

Prime Consultant Name: Osage	FEIN/Loc: 456789123/0	PO Number:	Invoice ID: 522
Sub Consultant Name: 77th Company	State Project ID: 0754-56-56	Master Contract ID:	Work Order:
			Status: Submitted to Higher Tier



Consultants: Review and Include Subcontractor Invoices - continued

6. Information only: Click **Accept** to indicate that the subcontractor invoice has been reviewed. Accepting the invoice does not include it on the prime invoice. The status changes to “Accepted by Higher Tier”.
7. Click **Include** to include the subcontractor invoice on the prime invoice. The included subcontractor invoice is removed from the **Invoice Selection** table. The costs are now included on the invoice as shown in step 10.
8. Information only: Click **Reject** to disallow the subcontractor invoice. The subcontractor invoice is removed from the prime contractor invoice and is given the status “Rejected by Higher Tier”. The invoice can be searched for and viewed, but it is unusable.
9. Click **Back** to return to the prime contract *View Invoice* page.
10. Included subcontractor invoices are listed in a table in the **Sub Consultant Invoices** section.

The costs for the sub consultant invoice are included in the **Total Due this Invoice** amount in the **Summary** section.

9 [← Back](#)

Invoice Selection
One item found. 1

Invoice Type	Vendor Name	Status	DOT Invoice ID	Invoice Total			
S	77th Company	Submitted to Higher Tier	522	17500.00	6 Accept	7 Include	8 Reject

Sub Consultant Invoices

-Select- [Create Invoice](#) [Accept/Include Invoices](#)

One item found. 1

Invoice Type	Vendor Name	DOT Invoice ID	Invoice Total	
S	77th Company	522	17,500.00	Remove

Total Sub Invoices Included: \$17,500.00

Sub Consultant Invoices

-Select- [Create Invoice](#) [Accept/Include Invoices](#)

One item found. 1

Invoice Type	Vendor Name	DOT Invoice ID	Invoice Total	
S	77th Company	522	17,500.00	Remove

Total Sub Invoices Included: \$17,500.00

Summary

Total DBE Cost This Invoice:	0.00
Total Non-DBE Cost This Invoice:	70,000.00
Total Due This Invoice:	\$87,500.00
Total Contract Maximum:	200,000.00
Previously Paid:	0.00
Remaining Agreement Balance:	200,000.00



Consultants: Create Invoices for Subcontractor

Prime or higher tier subcontractors can create invoices for a subcontractor.

1. Open the *View Invoice* page for the prime consultant's invoice.
2. In the **Sub Consultant Invoices** section, select a subcontractor in the first field.

Note: In the notation in the list, "S" means subcontractor and the last number ("0" in this case) is the contract phase.

3. Click **Create Invoice**. CARS opens the *Edit Invoice* page. Only consultant information can be entered or updated. Contract information is locked.
4. Select **No** under **Final Invoice**. Select **Yes** only when the work for a contract is complete and you are submitting final costs.
5. Enter a meaningful invoice identifier of your choosing in the **Consultant Invoice Number** field. This identifier is limited to 20 characters.
6. Enter dates in the **Start Date** and **End Date** fields. These dates refer to the period for which you are invoicing, not to the contract work period.
7. Enter the name and contact information of the person that WisDOT can contact if there are questions about the invoice in the **Name**, **Phone** and **Email** fields.
8. Click **Save**. CARS creates and opens the new invoice and assigns "Draft for Subcontract" status.

Sub Consultant Invoices

2 -Select- 3 Create Invoice Accept/Include Invoices

Total Sub Invoices Included: \$0.00

-Select-
S, 77th Company 0
S, Okmulgee 0

Edit Invoice

Contract Invoice Information

Consultant Name: Osage FEIN/Loc: 987654321/0 PO Number:

State Project ID: 0751-32-58 Master Contract ID: Work Order:

Project Description: county line County: Clark Contract Project Manager:

* Indicates required field

4 Final Invoice: * Yes No 5 Consultant Invoice Number: * 73 MTC 5-14 x

6 Time Period Covered by this Invoice:

Start Date: * 5/1/2014 End Date: * 05/31/2014

7 Consultant Contact:

Name: * Felicity Schreiber Phone: * 608-811-4597 Email: * fschreiber@osage.com

8 Save Cancel Create



Consultants: Create Invoices for Subcontractor - continued

9. Enter costs as you would for a prime contract.
10. Click **Back**.
11. Upload any necessary supporting documents. See *Upload Supporting Documents* on page 92 for details.
12. In the **Consultant Certification** section, click **Submit Invoice**. CARS will display the message, “Invoice submitted successfully” when the submittal is complete.
13. Click **Back to Dashboard**.
14. Open the prime contract invoice.
15. In the **Sub Consultant Invoices** section, click **Accept/Include Invoices**. CARS opens the *Invoice Selection* page.
16. Click **Include** for the appropriate subcontractor invoice. CARS includes the costs on the prime contract invoice and removes the subcontract invoice from the Invoice Selection table.
17. Click **Back**. Included subcontractor invoices are listed in a table in the **Sub Consultant Invoices** section.

Consultant Certification

I certify that to the best of my knowledge the work as listed has been completed, represents no duplication of payments, and that all costs are in compliance with the contract terms.

12 [Submit Invoice](#)

Sub Consultant Invoices

[-Select-](#) [Create Invoice](#) **15** [Accept/Include Invoices](#)

Total Sub Invoices Included: \$0.00

Invoice Selection
3 items found, displaying all items. 1

Invoice Type	Vendor Name	Status	DOT Invoice ID	Invoice Total			
S	Ottawa	Submitted to Higher Tier	517	17500.00	Accept	Include	Reject
S	Nowata	Submitted to Higher Tier	530	17500.00	Accept	Include	Reject
S	Ottawa	Submitted to Higher Tier	531	17500.00	Accept	16 Include	Reject

Sub Consultant Invoices

[-Select-](#) [Create Invoice](#) [Accept/Include Invoices](#)

17

One item found. 1

Invoice Type	Vendor Name	DOT Invoice ID	Invoice Total	
S	Ottawa	531	17,500.00	Remove

Total Sub Invoices Included: \$17,500.00



Consultants: Create Invoices as a Subcontractor or Amendment Subcontractor

When you are a subcontractor on a project, the steps used to enter invoice costs are the same as those for the prime contractor. One minor difference is that invoices are submitted to the prime contractor or the next higher tier contractor in the case of multi-tier contracts.

Consultants: Determine Where to Start Subcontract Invoices

The critical difference for subcontract invoices is where you choose to originate an invoice, particularly when the subcontract involves amendments.

The problem subcontractors face is that they cannot see the project structure as a whole like the prime can. For security reasons, the only parts they can see are individual subcontract and amendment subcontract records. It is easy to be confused when the “pieces” of a subcontract don’t seem to be connected.

The image to the right shows the subcontract structure as seen on a full contract record, as is visible to prime consultants. There are three sub-consultants. Amos, Able and Axel are original subcontractors; these firms are listed on the original contract before amendments were added. Amos is marked with yellow arrows. **Original subcontractors should start every invoice from the subcontract record - never from an amendment record.**

Acme is an amendment subcontractor (marked with red arrows). **Amendment subcontractors should start every invoice from the lowest-numbered amendment subcontract record.**

Original Subcontracts			
3 items found, displaying all items. 1			
Number	Lower-Tier Vendor	Higher-Tier Vendor	Original Cost
1	Amos Enterprises	Prime	\$22,948.29
2	Able Engineering	Prime	\$39,480.58
3	Axel Construction	Prime	\$26,500.00

Amendments						
3 items found, displaying all items. 1						
Number	Prime/Sub Vendor	Date Approved	Original Cost	Reason for Amendment		
6	Osage & Company	06/06/2016	\$0.00	Time extension only		
7	Osage & Company	06/16/2016	\$122,062.42	Additional services within original scope		
	Number				Lower-Tier Vendor	Higher-Tier Vendor
	1				Amos Enterprises	Prime
	2				Able Engineering	Prime
	3				Axel Construction	Prime
4	Acme, Inc.	Prime				
8	Osage & Company	10/13/2016	\$0.00	Additional costs		
	Number	Lower-Tier Vendor	Higher-Tier Vendor			
	1	Acme, Inc.	Prime			



Consultants: Determine Where to Start Subcontract Invoices - continued

It seems to make sense to start an invoice from the piece of the subcontract where the funds are shown – to invoice “against” those funds. But in CARS, funds are not tied to one contract or subcontract record. Rather, the funds for each part of a subcontract are linked behind the scenes such that a link can be added as needed (like a new amendment). The chain starts at the “top” or the first level on which a firm is listed on the contract record, and that is where invoices should always start. If a new amendment is added, the chain connecting the funds gets longer. If an invoice is started in the middle of the chain, CARS starts a new chain that is not connected to the old chain, and the funds and data about previous payments is disconnected. Once that new chain is started, it persists until it is deleted from the database, even if the invoice that started the chain is deleted. That is why invoices started from the wrong level in CARS require a code or SQL “fix”. Code fixes cannot be made to CARS except during scheduled down times.

Fortunately, subcontractors and amendment subcontractors can see a simple version of the contract structure on the CARS dashboard. By using the filter tools, you can be certain to start an invoice from the “highest” level on a subcontract.

Consultants: How to Find the Correct Invoice Starting Point

Especially if you are unsure if your firm is an original subcontractor or an amendment subcontractor, start your invoice by searching the subcontracts on the Dashboard. The fastest way to find a subcontract record on the dashboard when you have several pages of them is to filter the records. CARS lists projects where your firm is an original subcontractor. CARS may also return no results if your firm is not an original subcontractor.

Original subcontractors should start every invoice from the subcontract record - never from an amendment record.

1. On the Dashboard, expand the **Sub Contracts** section.
2. Enter the project ID in the Project ID field.
3. Click **Filter**. CARS lists matching projects where your firm is a subcontractor. See *Consultants: Dashboard Elements* on page 59 of the CARS manual for more details.
4. Open the subcontract record to start the invoice.

Note: Some consultants have more than one contract under the same project number. When filtering contracts by project number, check the contract number and other data shown in the list to make sure you are invoicing against the correct contract.

The screenshot shows the 'Sub-Contracts' section of the CARS dashboard. It includes a search form with a 'Project ID' field containing '1007-10-01' and a 'Prime Vendor' field. A 'Filter' button is visible below the search fields. Below the filter, it indicates '3 items found, displaying all items. 1'. A table lists the following contract records:

Contract	Type	Status	Limits
1007-10-01 : 1400000660 : 06/05/2013	Regular	Active	
1007-10-01 : 1400016023 : 01/19/2016	Regular	Active	
1007-10-01 : 706110017 : 12/27/2011	Regular	Active	

Below the table, it indicates '3 items found, displaying all items. 1'.



Consultants: How to Find the Correct Invoice Starting Point - continued

If you do not find an original subcontract record, then find the lowest numbered amendment subcontract.

1. On the Dashboard, expand the **Amendment Subcontracts** section.
2. Enter the project ID in the Project ID field.
3. Click **Filter**. CARS lists projects where your firm is an amendment subcontractor. The number at the end of the link in the Contract column is the amendment number. See *Consultants: Dashboard Elements* on page 60 for more details.
4. Open the amendment subcontract record for the lowest-numbered amendment subcontract and start the invoice from that record. In this example, that amendment subcontract number is 7.

Amendment SubContracts

2 Project ID Prime Vendor
1003-10-25

3 Filter

2 items found, displaying all items. 1

Contract	Type	Status	Limits
1003-10-25 : 1400001460 : 08/16/2013 : 7	Regular	Active	
1003-10-25 : 1400001460 : 08/16/2013 : 8	Regular	Active	

2 items found, displaying all items. 1

Amendment subcontractors should start every invoice from the lowest-numbered amendment subcontract record.

Note: If not all links for the same amendment subcontract are active, then you do not have security to access all of the amendment subcontracts. Contact your firm's CARS administrator to get access assigned before starting a new invoice. You must have access to all pieces of the amendment subcontract before the costs will load correctly.



Consultants: Previously Paid Amounts in CARS

Cumulative totals of costs that were already invoiced within CARS (including external amounts reported as paid outside CARS) are shown on all invoices, regardless of invoice status.

The image illustrates where previously paid amounts may appear on an invoice for a lump sum contract.

Lump Sum	
DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services Edit	
Earned to Date:	0.00
Contract Maximum:	52,430.00
Subject to Maximum:	0.00
Previously Paid:	9,201.47
Due This Line Item:	-9,201.47
Total Lump Sum Due:	-\$9,201.47
Sub Consultant Invoices	
Total Sub Invoices Included:	\$0.00
Summary	
Total DBE Cost This Invoice:	0.00
Total Non-DBE Cost This Invoice:	-9,201.47
Total Due This Invoice:	-\$9,201.47
Total Contract Maximum:	52,430.00
Previously Paid:	9,201.47
Remaining Agreement Balance:	43,228.53

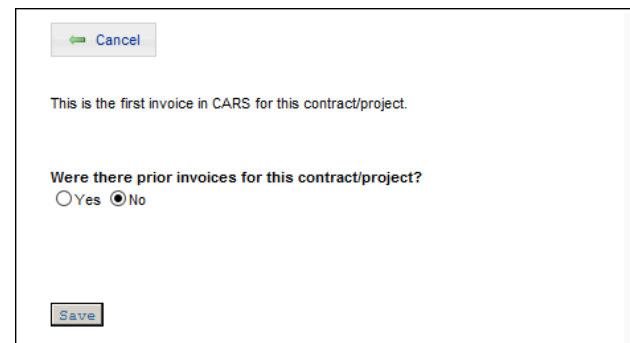


Consultants: First Invoice in CARS Question

CARS needs to include previously paid amounts in payment calculations. For the first invoice entered in CARS for a contract or project, the system always asks you to enter amounts and fixed fees previously paid outside CARS for each basis of payment (actual cost, cost per unit, lump sum or specific rate). If the contract has more than one basis of payment, you must answer the “prior invoices” question for each basis of payment type for the first invoice.

Note: If you try to submit a first-time invoice without answering the “previous paid” question for each basis of payment type, even if there is no invoiced amount, CARS will display an error message, “Cannot submit. Missing previous paid information. Please edit:(invoice description) to set previous paid”.

1. If there are no previously paid amounts, select **No** and then click **Save**. CARS continues with adding cost information as described for the appropriate basis of payment.
2. If there are previously paid amounts, select **Yes**. CARS provides fields to collect the previously paid amounts. The fields you see will vary based on whether there are fixed fees for the cost basis.



The screenshot shows a web form with a 'Cancel' button at the top left. Below it is the text: 'This is the first invoice in CARS for this contract/project.' The main question is 'Were there prior invoices for this contract/project?' with two radio button options: 'Yes' and 'No'. The 'No' option is selected. At the bottom left is a 'Save' button.



Consultants: First Invoice in CARS Question - continued

3. Enter the total amount that was previously invoiced outside CARS for this contract or invoice for your firm only. Do not include payments to subconsultants. Enter only costs for the same basis of payment (actual cost, cost per unit, lump sum, or specific rate). The fields for actual cost invoices are different from those for cost per unit, lump sum, and specific rate invoices.
4. For actual cost invoices, enter the total of only the fixed fees previously paid outside CARS for this contract or invoice.
5. Click **Save**. CARS continues to the *Contract Items* page for the appropriate basis of payment. The previously paid amounts are shown at the top of the page, including zero amounts.

← Cancel

This is the first invoice in CARS for this contract/project.

Were there prior invoices for this contract/project?
 Yes No

* Indicates required field

3 Previously Invoiced Amount (Including Fixed Fee): * 4 Fixed Fee Amount Previously Invoiced: *
28291.22 x 875.76

5 Save

Actual Cost Previously Invoiced Amounts

← Cancel

This is the first invoice in CARS for this contract/project.

Were there prior invoices for this contract/project?
 Yes No

* Indicates required field

3 Previously Invoiced: *

5 Save

Cost Per Unit, Lump Sum, and Specific Rate Previously Invoiced Amounts

Previous values saved successfully.
Actual Cost Contract Items

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services

Previous Paid External: 28,291.22 Previous Paid Fixed Fee External: 875.76

← Back

Edit Previous Paid






Consultants: First Invoice in CARS Question - continued

The previously invoiced amounts are also figured into the amounts shown on the *View Invoice* page.

Note: CARS performs calculations using the previously paid amounts before displaying the cost summary on the *View Invoice* page.

The previously incurred (invoiced amounts are also figured into the amounts shown on the *View Invoice* page.

Actual Cost	
DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services Edit	
Actual Costs	
Incurring This Invoice:	8,533.64
Previously Incurred:	27,415.46
<hr/>	
Incurring to Date:	35,949.10
Contract Maximum:	78,717.85
Subject to Maximum:	35,949.10
Previously Paid:	27,415.46 
<hr/>	
Actual Cost Due:	8,533.64
Fixed Fee	
Earned to Date:	4,437.00
Contract Maximum:	24,650.00
Subject to Maximum:	4,437.00
Previously Paid:	875.76 
<hr/>	
Fixed Fee Due:	3,561.24
Due This Line Item:	12,094.88
Total Actual Cost Due:	\$12,094.88
<hr/>	
Summary	
Total DBE Cost This Invoice:	0.00
Total Non-DBE Cost This Invoice:	12,094.88
Total Due This Invoice:	\$12,094.88
Total Contract Maximum:	103,367.85
Previously Paid:	28,291.22 
Remaining Agreement Balance:	75,076.63

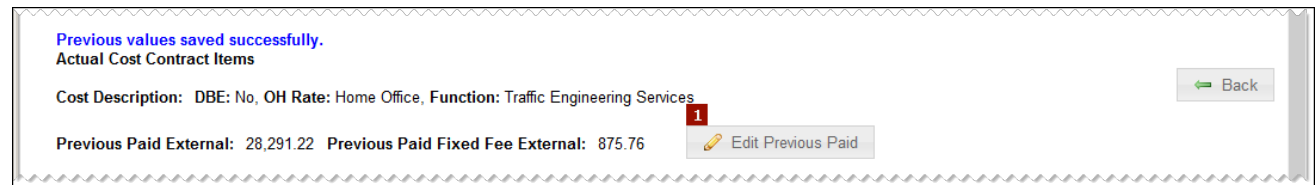


Consultants: Edit Previously Invoiced Amount

You can adjust the amount reported as previously paid outside CARS if you find an error. You must edit previously paid amounts using the appropriate basis for payment *Contract Items* page.

Note: The “previously invoiced” question is asked only for the first invoice for a project in CARS. You can enter and edit this information only on the first invoice submitted in CARS.

1. Click **Edit Previous Paid**. CARS opens the *Edit Previous Paid* page.
2. Adjust the value in the **Previously Invoiced Amount (Including Fixed Fee)** field, if needed.
3. Adjust the value in the **Fixed Fee Amount Previously Invoiced** field, if needed.
4. Click **Save**. CARS adjusts the previously paid amounts and returns to the previous *Contract Items* page.



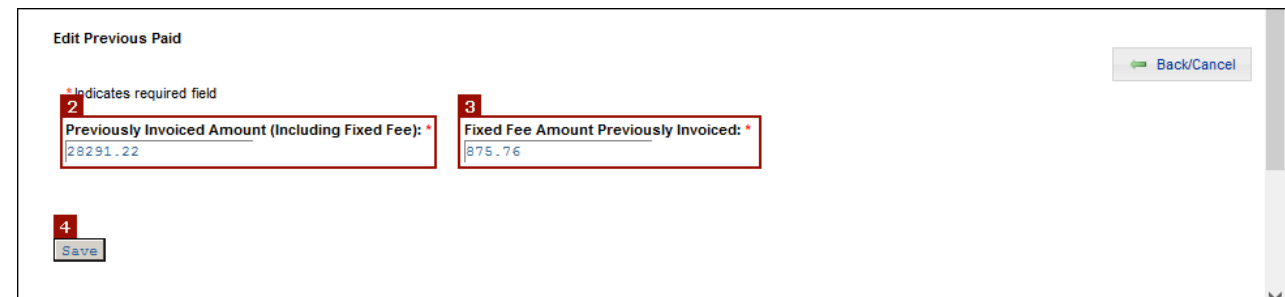
Previous values saved successfully.
Actual Cost Contract Items

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services

Previous Paid External: 28,291.22 Previous Paid Fixed Fee External: 875.76

[← Back](#)

[Edit Previous Paid](#)



Edit Previous Paid

* Indicates required field

2 Previously Invoiced Amount (Including Fixed Fee): *
28291.22

3 Fixed Fee Amount Previously Invoiced: *
875.76

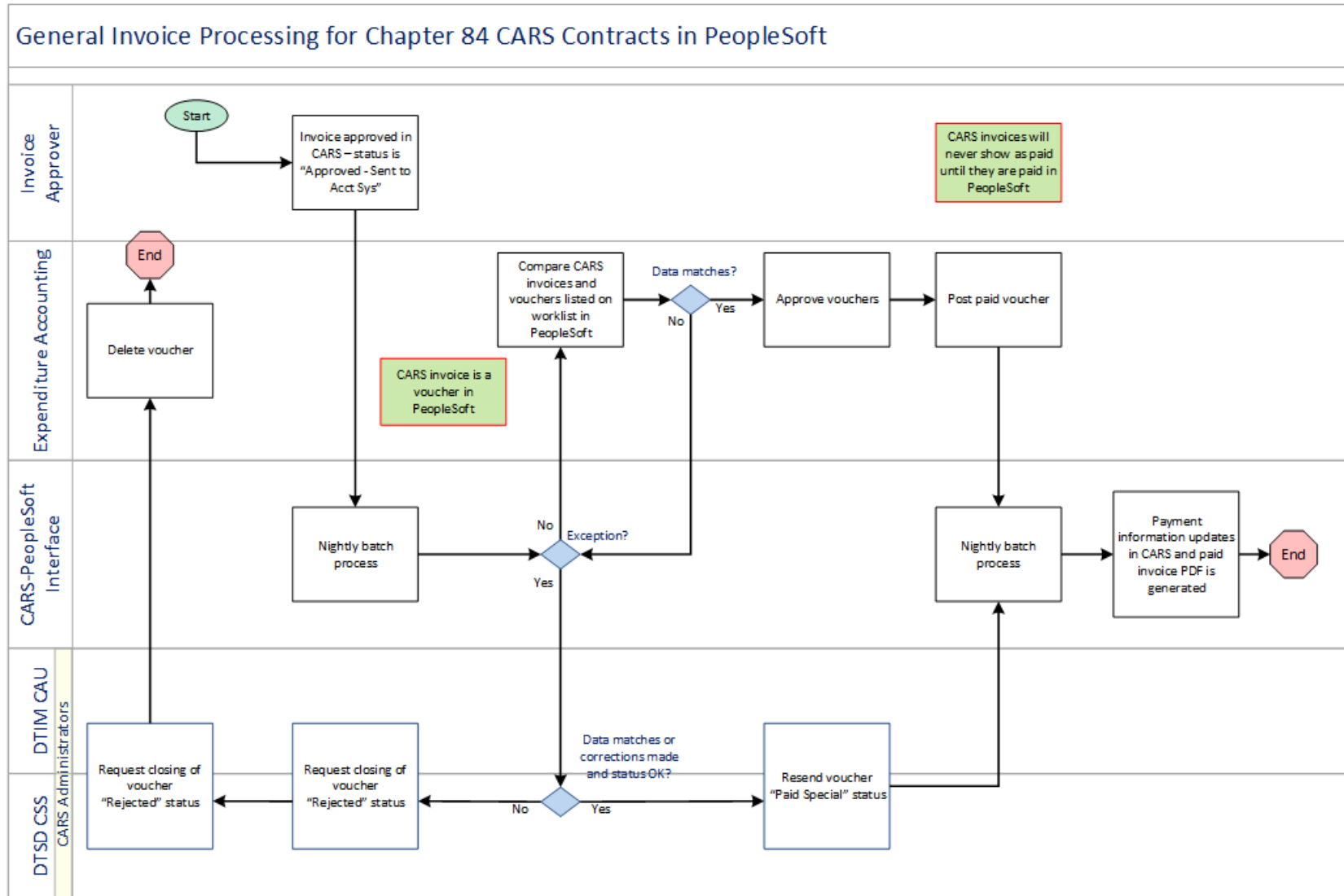
4 [Save](#)

[← Back/Cancel](#)



CARS Invoicing Through PeopleSoft

The process diagram below shows the high-level process for simple invoice processing of CARS (Chapter 84) contract invoices through PeopleSoft.



WisDOT: Approve Invoice

Note: Invoices cannot be processed until a purchase order number is assigned to the contract or work order.

Use this process to approve invoices in CARS. After the invoice status is set to “Approved”, the invoice is accessed in CARS by Expenditure Accountants for payment.

With the implementation of the CARS-PeopleSoft interface, it takes a minimum of two days before an approved invoice is paid by automated batch processes.

1. Expand the **Invoices** section on your dashboard. CARS lists all invoices in the system.
2. Locate the invoice to pay.
 - a. If needed, sort the invoices to help to find the one you need. Click the blue link in the column heading to sort A to Z, and click it again to sort Z to A. When you sort by **Status** (A-Z), the submitted invoices are listed last.
 - b. Use the page selection tools to see more invoices in the list.
3. Click the invoice link in the **Project Id/Master/WO#** column for the appropriate invoice. CARS opens the invoice.

JUSER Project, Contract or Master Contract: Search

Evaluations

1 Invoices

37 items found, displaying 31 to 37. [First/Prev] 1, 2, 3, 4 [Next/Last]

Project Id /Master /WO #	Type	Prime Vendor	Contact Name	Project Manager	Status	Consultant Invoice#	Created Date	Invoice Period
0657-01-00		Lexi Glass	John Brock	Anne Wallace	Submitted	555	08/01/2014	07/01/2014 to 07/17/2014
1430-00-05		Lexi Glass	Parra	Deb Webb-Franseen	Submitted	jj4164	08/02/2014	06/01/2014 to 06/06/2014
1602-11-60		BC Discount	Dan	Jim Volkmann	Submitted	1005	08/04/2014	07/01/2014 to 07/16/2014
4337-10-72		Lexi Glass	Lexi Geer	Matthew Haefs	Submitted	1010	08/04/2014	06/01/2014 to 06/18/2014
0687-11-20		BC Paving	Mary Greuel	Sharon Bremser	Submitted	20140570	08/05/2014	06/01/2014 to 07/31/2014
1670-01-60		Karr's Details	Dean Karr	William Strobel	Submitted	50002	08/07/2014	07/01/2014 to 07/23/2014
0687-11-24		Nowata	Kristine Coulter	J User	Submitted	241 6-14 1	08/11/2014	06/01/2014 to 06/30/2014

37 items found, displaying 31 to 37. [First/Prev] 1, 2, 3, 4 [Next/Last]

DO NOT APPROVE INVOICES IN CARS PLEASE CLICK REVIEWED INSTEAD

Until further notice, do not approve invoices in CARS. Due to the implementation of PeopleSoft in July 2016, there are problems with many invoices involving fixed fee percentages, order, timing, invoice amounts, etc.



WisDOT: Approve Invoice - continued

- Review the costs and documents.
- Click **View Details** for each cost section on the invoice: Actual Cost, Cost Per Unit, Lump Sum, or Specific Rate. The cost sections on the invoice are determined by the contract terms, and some sections may not appear on your invoice. Parts of the *Actual Cost Contract Items* page are shown in the sample.

CARS opens the appropriate *Contract Items* page.

- Review the cost details, and adjust or reverse costs as needed.
- Click **Back** to return to the *View Invoice* page.
- Click **Approved**. CARS changes the status of the invoice to “Approved - Sent to Acct Sys”. The invoice is no longer listed on your dashboard. Expenditure Accounting handles invoices for payment using semi-automated processes in PeopleSoft. Once an invoice is sent to the financial systems, its status in CARS is determined by data from PeopleSoft. Invoices cannot be reverted to “Draft” or “Submitted” status once they are approved.

Once the invoice is marked “Paid” by PeopleSoft, CARS automatically sends email to designated consultant staff members notifying them that this invoice has been paid.

Actual Cost 5

DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services [View Details](#)

Actual Costs

Incurring This Invoice: 24,162.56
Previously Incurred: 0.00

Actual Cost Contract Items 7 [Back](#)

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services

Previous Paid External: 0.00 Previous Paid Fixed Fee External: 0.00 [Edit Previous Paid](#)

Direct Labor and Overhead

6 items found, displaying all items. 1

First Name	Last Name	Employee Number	Employee Classification	Hours Type	Hours	Activity	Month	Year	Indirect Cost Rate Type	Labor Cost	Adjustment		
Fred	Black	B45	Worker	Hours Worked	160.0	108- General Field Work	6	2014		4,608.00	N		
Luis	Sanchez	S78	worker	Hours Worked	160.0	108- General Field Work	6	2014		4,608.00	N		
William	Smedbron	S89	Worker	Hours Worked	160.0	108- General Field Work	6	2014		4,608.00	N		
Miles	Fiennes	F46	Worker	Hours Worked	160.0	108- General Field Work	6	2014		47.36	N		
Magnus	McGillicutty	M95	Field Supervisor	Hours Worked	160.0	103- General Supervision	6	2014		5,196.80	N		
							6	2014		5,094.40	N		

Total Labor: \$24,162.56

Total Cost: \$24,162.56

Total Fixed Fee: \$3,833.50

Rejected Reason: _____

**DO NOT APPROVE INVOICES IN CARS
PLEASE CLICK REVIEWED INSTEAD**

Until further notice, do not approve invoices in CARS. Due to the implementation of PeopleSoft in July 2016, there are problems with many invoices involving fixed fee percentages, order, timing, invoice amounts, etc.



WisDOT: Adjust Invoice

Adjusting invoices serves the purpose of paying consultants faster. Rather than hold or reject a \$50,000 invoice for a question about a \$50 cost, the \$50 item can be adjusted out and the rest of the invoice paid.

- Invoices can be adjusted only by persons who have the WisDOT Invoice Approver role.
- Direct labor hour and cost adjustments must always be negative (subtractions).
- Direct and indirect cost adjustments can be positive or negative numbers.
- Fixed fee, lump sum and cost per unit adjustments must always be positive numbers; however, the corrected values may be higher or lower than the original values.
- See *Edit Previously Invoiced Amount* on page 110 for details on editing this type of costs.

Note: Invoice adjustments are uncommon in practice, but the system allows them to be made.




WisDOT: Adjust Direct Labor and Overhead

Direct labor costs are submitted as actual costs or as specific rate costs. Actual costs may be subject to overhead.

1. On the *View Invoice* page in the **Actual Cost** section, click **View Details**. CARS opens the *Actual Cost Contract Items* page.


Note: The “N” values in the **Adjustment** column mark the lines that are not adjustments entered by the approver.

2. Click **Adjust Direct Labor**  for the appropriate record. CARS opens the *Adjust Direct Labor* page.
3. Enter the number of hours to subtract in the **Hours** field.
4. Enter the cost to subtract in the **Labor Cost** field.
5. Enter an explanation of the adjustment in the **Adjustment Reason** field.
6. Click **Save**. CARS returns to the *Actual Cost Contract Items* page and adds an adjustment line.

You may continue with reviewing the invoice, adding more adjustments or approving the invoice.













Actual Cost Contract Items ← Back

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services

Previous Paid External: 0.00 Previous Paid Fixed Fee External: 0.00  Edit Previous Paid

Direct Labor and Overhead

6 items found, displaying all items. 1

First Name	Last Name	Employee Number	Employee Classification	Hours Type	Hours	Activity	Month	Year	Indirect Cost Rate Type	Labor Cost	Adjustment		
Fred	Black	B45	Worker	Hours Worked	160.0	108- General Field Work	6	2014		4,608.00	N		
Luis	Sanchez	S78	worker	Hours Worked	160.0	108- General Field Work	6	2014		4,608.00	N		
William	Smedbron	S89	Worker	Hours Worked	160.0	108- General Field Work	6	2014		4,608.00	N		
Miles	Fiennes	F46	Worker	Hours Worked	160.0	108- General Field Work	6	2014		47.36	N		
Magnus	McGillicutty	M95	Field Supervisor	Hours Worked	160.0	103- General Supervision	6	2014		5,196.80	N		
Millie	Chmura	C18	Office Supervisor	Hours Worked	160.0	107- General Office Work	6	2014		5,094.40	N		

Total Labor: \$24,162.56

USER Project, Contract or Master Contract: Search

← Back/Cancel

Adjust Direct Labor

* Indicates required field















Enter positive values (will be saved as negative).

3 Hours: * 4 Labor Cost: * 5 Adjustment Reason: *

6 **Save**

Direct Labor and Overhead

7 items found, displaying all items. 1


First Name	Last Name	Employee Number	Employee Classification	Hours Type	Hours	Activity	Month	Year	Indirect Cost Rate Type	Labor Cost	Adjustment		
Fred	Black	B45	Worker	Hours Worked	160.0	108- General Field Work	6	2014		4,608.00	N		
Luis	Sanchez	S78	worker	Hours Worked	160.0	108- General Field Work	6	2014		4,608.00	N		
William	Smedbron	S89	Worker	Hours Worked	160.0	108- General Field Work	6	2014		4,608.00	N		
Miles	Fiennes	F46	Worker	Hours Worked	160.0	108- General Field Work	6	2014		47.36	N		
Magnus	McGillicutty	M95	Field Supervisor	Hours Worked	160.0	103- General Supervision	6	2014		5,196.80	N		
Millie	Chmura	C18	Office Supervisor	Hours Worked	160.0	107- General Office Work	6	2014		5,094.40	N		
Miles	Fiennes	F46	Worker	Hours Worked	-160.0	108- General Field Work	6	2014		-47.36	Y		

Total Labor: \$24,115.20



WisDOT: Adjust Indirect Costs

Indirect costs are reported as actual costs.

1. On the *View Invoice* page in the **Actual Cost** section, click **View Details**. CARS opens the *Actual Cost Contract Items* page.
2. Click **Adjust Indirect Cost**  for the appropriate record. CARS opens the *Adjust Indirect Cost* page.
3. Enter the difference between the invoice costs and the adjusted cost in the **Costs Subject to Indirect Cost Rate** field. Enter “-” for negative adjustments.
4. Enter an explanation for the adjustment in the **Adjustment Reason** field.
5. Click **Save**.

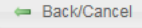
CARS returns to the *Actual Cost Contract Items* page. The adjustment line is added in the **Indirect Costs** section. CARS also displays

Indirect Costs

One item found. 1

Costs Subject to Indirect Cost Rate	Description	Month	Year	Indirect Cost Rate Type	Rate	Indirect Cost	Adjustment		
498.15	Office Supplies	6	2014	Company Wide	1.83	911.61	N		


Total Indirect Cost: \$911.61

Adjust Indirect Cost 

* Indicates required field

Enter positive or negative value.

3 Costs Subject To Indirect Cost Rate: *	4 Adjustment Reason: *
-259.46	Disallowed some expenses shown in receipt

5 

Indirect Cost adjustment saved successfully. 

Actual Cost Contract Items 

Cost Description: DBE: Yes, OH Rate: Home Office, Function: Traffic Engineering Services

Previous Paid External: 0.00 Previous Paid Fixed Fee External: 0.00 

Direct Labor and Overhead

Nothing found to display. Total Labor: \$0.00

Indirect Costs

2 items found, displaying all items. 1


Costs Subject to Indirect Cost Rate	Description	Month	Year	Indirect Cost Rate Type	Rate	Indirect Cost	Adjustment		
498.15	Office Supplies	6	2014	Company Wide	1.83	911.61	N		
-259.46	Office Supplies	6	2014	Company Wide	1.83	-474.81	Y		

Total Indirect Cost: \$436.80



WisDOT: Adjust Direct Costs



Direct labor costs can be included as actual costs or as specific rate costs.

1. On the *View Invoice* page in the **Actual Cost** section, click **View Details**. CARS opens the *Actual Cost Contract Items* page.
2. Click **Adjust Direct Cost**  for the appropriate record. CARS opens the *Adjust Direct Cost* page.
3. Enter the difference between the invoice rate and the adjusted cost rate in the **Unit Rate** field. Enter “-” for negative adjustments.
4. Enter the total adjustment in the **Direct Cost** field. You can enter this value or have CARS calculate it.
5. Click **Calculate** if you want CARS to calculate the value for Units × Unit Rate.
6. Enter an explanation for the adjustment in the **Adjustment Reason** field.
7. Click **Save**.

CARS returns to the *Actual Cost Contract Items* page. The adjustment line is added in the **Direct Costs** section. CARS also displays a message that the direct cost adjustment was successfully saved.

Direct Costs

One item found. 1

Category	Description	Paid To Type	Payee Name	Units	Unit Rate	Unit Description	Month	Year	Indirect Cost Rate Type	Direct Cost	Adjustment		
Company vehicle mileage	Company Car	Internal Allocation		643.50	0.55	miles	6	2014		353.93	N		

Total Direct Cost: \$353.93

Adjust Direct Cost [← Back/Cancel](#)

* Indicates required field

Enter positive or negative values.

Units: 643.5

3 Unit Rate:


4 Direct Cost: *

5 Calculate

Enter direct cost above or hit Calculate to use units and rate.

6 Adjustment Reason: *

7 Save

Direct Cost adjustment saved successfully. 

Actual Cost Contract Items [← Back](#)

Cost Description: DBE: Yes, OH Rate: Home Office, Function: Traffic Engineering Services





Previous Paid External: 0.00 Previous Paid Fixed Fee External: 0.00

Direct Labor and Overhead

Nothing found to display. Total Labor: \$0.00

Direct Costs

2 items found, displaying all items. 1

Category	Description	Paid To Type	Payee Name	Units	Unit Rate	Unit Description	Month	Year	Indirect Cost Rate Type	Direct Cost	Adjustment		
Company vehicle mileage	Company Car	Internal Allocation		643.50	0.01	miles	6	2014		6.44	Y		
Company vehicle mileage	Company Car	Internal Allocation		643.50	0.55	miles	6	2014		353.93	N		


Total Direct Cost: \$360.37

Total Cost: \$797.17



WisDOT: Adjust Fixed Fee, Lump Sum and Cost Per Unit

The process for adjusting these three cost types is similar. Fixed fees are found in the **Actual Cost** section. Lump sum and cost per unit amounts are major sections themselves.

1. In the appropriate cost type section of the invoice, click **View Details**.
2. On the contract item page, click **Adjust** .
3. Enter a new value in the **Percent Complete** field.
4. Enter an explanation for the adjustment in the **Adjustment Reason** field.
5. Click **Save**. CARS returns to the contract item page and displays a message that the adjustment was saved successfully. The adjustment details are shown below the original percent complete.

Lump Sum 1 [View Details](#)

DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services

Earned to Date:	13,814.38
Contract Maximum:	48,050.00
Subject to Maximum:	13,814.38
Previously Paid:	0.00
Due This Line Item:	13,814.38

Total Lump Sum Due: \$13,814.38

Lump Sum Contract Item [← Back](#)

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services

Previous Paid External: 0.00 [Edit Previous Paid](#)

Lump Sum

2 Percent Complete: 28.75% Contract Amount: 48,050.00 Total Lump Sum: \$13,814.38

[← Back/Cancel](#)

Adjust Lump Sum

* Indicates required field

3 **Percent Complete: ***
29 %

4 **Adjustment Reason: ***
Calculation correction

5 [Save](#)

Lump Sum Contract Item [← Back](#)

Cost Description: DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services

Previous Paid External: 0.00 [Edit Previous Paid](#)

Lump Sum adjustment saved successfully. 

Lump Sum


Percent Complete: 28.75%

Adjusted Percent Complete: 29% Contract Amount: 48,050.00 **Total Lump Sum: \$13,834.50**



WisDOT: Delete Adjustment





Use this process for any adjustment line.

1. In the appropriate cost type section of the invoice, click **View Details**.
2. On the contract item page, locate the appropriate adjustment line and click **Are you sure you want to DELETE adjustment?** .

CARS displays an *Are you sure?* message.

3. Click **Confirm**.

CARS removes the adjustment line from the invoice. The adjusted costs are no longer on the invoice.

Indirect Costs									
2 items found, displaying all items. 1									
Costs Subject to Indirect Cost Rate	Description	Month	Year	Indirect Cost Rate Type	Rate	Indirect Cost	Adjustment		
498.15	Office Supplies	6	2014	Company Wide	1.83	911.61	N		
-259.46	Office Supplies	6	2014	Company Wide	1.83	-474.81	Y		
							Total Indirect Cost: \$436.80		

Are you sure? ✕


Are you sure you want to DELETE adjustment?

3



WisDOT: Reverse Cost

Use this process for any invoice cost line.



1. In the appropriate cost type section of the invoice, click **View Details**.
2. On the contract item page, locate the appropriate adjustment line and click **Reverse Cost** .
3. Enter the reason for the reversal in the **Adjustment Reason** field.
4. Click **Save**.

CARS opens the *Reverse Cost* page.

CARS enters an adjustment line that reverses the cost on the contract item page and displays a message that the reversal was successfully saved. The adjusted costs are no longer on the invoice.

Direct Costs

One item found. 1

Category	Description	Paid To Type	Payee Name	Units	Unit Rate	Unit Description	Month	Year	Indirect Cost Rate Type	Direct Cost	Adjustment		
Company vehicle mileage	Company Car	Internal Allocation		643.50	0.55	miles	6	2014		353.93	N		 2

Total Direct Cost: \$353.93


Reverse Direct Cost ← Back/Cancel

* Indicates required field

3 Adjustment Reason: *
costs not allowed for this contract

4 Save

JUSER Project, Contract or Master Contract: Search





Direct Cost reversal saved successfully. 

Actual Cost Contract Items ← Back


Cost Description: DBE: Yes, OH Rate: Home Office, Function: Traffic Engineering Services

Direct Costs

2 items found, displaying all items. 1

Category	Description	Paid To Type	Payee Name	Units	Unit Rate	Unit Description	Month	Year	Indirect Cost Rate Type	Direct Cost	Adjustment		
Company vehicle mileage	Company Car	Internal Allocation		643.50	0.55	miles	6	2014		353.93	N		
Company vehicle mileage	Company Car	Internal Allocation		643.50	-0.55	miles	6	2014		-353.93	Y		

Total Direct Cost: \$0.00

Total Cost: \$0.00 



WisDOT: Reject Invoice

Use this process for any invoice.

1. In the **Approver/Reviewer** section of the invoice, enter the reason for the rejection in the **Rejected Reason** field.
2. Click **Rejected**.

CARS changes the status of the invoice to “Rejected” and removes it from the dashboard.

CARS automatically sends email to designated consultant staff members notifying them that this invoice has been rejected.



Approver/Reviewer

Reviewed Approved

2 Rejected

1 Rejected Reason:

**Invoices that have been rejected cannot be re-used. Please consider asking the CARS Administrators to set the invoice back to draft status first. Email requests to:
WisDOTCARS@dot.wi.gov**



View Paid Invoices

WisDOT and consultants can view a list of paid invoices for a particular project or contract from the *View Invoice* page. The invoice must be paid to be listed, not submitted or approved.

1. Click **View Paid Invoices**. CARS opens the *Paid Invoices List* page.
2. The *Paid Invoices List* provides invoice details that will allow you to search for and open the invoice to review the details.
 - a. **Project ID**
 - b. **DOT invoice ID**
 - c. **Consultant Invoice Number**
 - d. WisDOT only: **Vendor**
See *Search Invoices* on page 31 for instructions for locating invoices.

Invoice ID	Consultant Invoice No	Date Paid	Fixed Fee	Amount Paid
25	V MTC 6-14	07-30-2014	\$0.00	\$9,201.47
458	V MTC 7-14	08-04-2014	\$0.00	\$26,844.16
571	24 2nd sub	08-04-2014	\$0.00	\$9,568.47
Totals:			\$0.00	\$45,614.10



View Purchase Order Information

Any WisDOT user can view purchase order information in CARS. Some of the information comes from PeopleSoft while other details are reported or calculated using CARS data.

1. Search for the contract record in CARS as described in [Search Contracts](#) on page 26. CARS opens the *View Contract* page.
2. Click the **Purchase Order Number** link in the **Contract Information** section. CARS opens the *View Purchase Order Information* page.

Note: A newly-entered PO number in CARS does not become an active link until the interface runs.

In the image to the right, information that is highlighted in yellow comes from CARS. Above the **Active PO Lines - Active** section is static contract information. The six highlighted fields within the **Active PO Lines - Active** section contain values that are calculated using invoice data from CARS. All other fields (no highlight) contain data transmitted from PeopleSoft.

Note: Values in the six fields calculated using CARS invoice data are always displayed in red.

View Contract
[← Back to Search Results](#)
[Print Page](#)
[★ Favorite](#)
[Go to Bottom](#)

[▶ Contract Uploaded Documents](#)
[▶ Contract Reports](#)
[▼ Contract Information](#)

Project ID: 1440-15-22	Contract Number: 724100001	View DT25
Contract Type: Regular	2 Purchase Order Number: 3483109	Associated Projects
Phases: 0	Contract Function: Real Estate Services	One item found. 1
Staged Number:	Program Code: 3022	Project ID
Period Date:		1440-13-22

View Purchase Order Information PO Originated in Legacy System Pre-PeopleSoft

Purchase Order #: 3483109	Project ID: 1440-15-22	Contract #: 724100001	Work Order #:	Vendor: Inc.
------------------------------	---------------------------	--------------------------	---------------	-----------------

Active PO Lines - Active

PO Line #: 1	PO Status: Active	PO Date: 07/01/2016	Account: 8700229	Class Field: 96100
Dept ID: 1023244100	Program Code:	Vendor ID: 1239	Vendor Location: MAIN	
Requisition #: 0	Requisition Line #: 0	Acc Sys Encumbered Amt: 151134.12	Acc Sys Balance:	Acc Sys Paid to Date:
Description: FOND DU LAC CO, STH 23, STH 67-USH 41		CARS Current Contract Cost: \$200,042.32	CARS Contract Balance: \$148,443.98	CARS Paid to Date: Paid Externally : \$26,211.09 Paid in CARS : \$25,387.25 Receipts: \$0.00 Total: \$51,598.34



View Purchase Order Information - continued

Field Descriptions:

PO Line # - PeopleSoft PO line number associated with the information shown

PO Status - Translation of the PO status in PeopleSoft. CARS does not receive PO data when the PeopleSoft status is not one of those listed.

PeopleSoft Status	CARS Status
D - Dispatched	Active
PA - Pending Approval	Pending Approval
A - Approved	Approved
C - Complete	Closed
X - Cancelled	Cancelled

PO Date - Date the PO was created in PeopleSoft (usually by interface automation)

Account - STAR account code based on the former WisDOT Object Code. See [Appendix 12 - Account Number based on Object Code](#) on page 247 for details.

Class Field - TBD

View Purchase Order Information PO Originated in Legacy System Pre-PeopleSoft

Purchase Order #: 3483109	Project ID: 1440-15-22	Contract #: 724100001	Work Order #:	Vendor: Inc.
-------------------------------------	----------------------------------	---------------------------------	----------------------	------------------------

Active PO Lines - Active

PO Line #: 1	PO Status: Active	PO Date: 07/01/2016	Account: 8700229	Class Field: 96100
Dept ID: 1023244100	Program Code:	Vendor ID: 1239	Vendor Location: MAIN	
Requisition #: 0	Requisition Line #: 0	Acc Sys Encumbered Amt: 151134.12	Acc Sys Balance:	Acc Sys Paid to Date:
Description: FOND DU LAC CO, STH 23, STH 67-USH 41		CARS Current Contract Cost: \$200,042.32	CARS Contract Balance: \$148,443.98	CARS Paid to Date: Paid Externally : \$26,211.09 Paid in CARS : \$25,387.25 Receipts: \$0.00 Total: \$51,598.34



View Purchase Order Information - continued

Field Descriptions - continued

Dept ID - Numerical value identifying the specific WisDOT department. See the Office of Policy, Finance and Improvement intranet site for the current list of Department (Org) codes.

Program Code - Legislative program code

Vendor ID - Unique number assigned to a consultant firm

Vendor Location - Indicates a vendor's location; needed particularly when a vendor has multiple offices

Requisition # - PeopleSoft requisition number that initiated this PO. There is no PeopleSoft requisition for converted purchase orders.

Requisition Line # - PeopleSoft requisition line number associated with this PO. There is no PeopleSoft requisition for converted purchase orders.

View Purchase Order Information		PO Originated in Legacy System Pre-PeopleSoft		
Purchase Order #: 3483109	Project ID: 1440-15-22	Contract #: 724100001	Work Order #:	Vendor: Inc.
Active PO Lines - Active				
PO Line #: 1	PO Status: Active	PO Date: 07/01/2016	Account: 8700229	Class Field: 96100
Dept ID: 1023244100	Program Code:	Vendor ID: 1239	Vendor Location: MAIN	
Requisition #: 0	Requisition Line #: 0	Acc Sys Encumbered Amt: 151134.12	Acc Sys Balance:	Acc Sys Paid to Date:
Description: FOND DU LAC CO, STH 23, STH 67-USH 41		CARS Current Contract Cost: \$200,042.32	CARS Contract Balance: \$148,443.98	CARS Paid to Date: Paid Externally : \$26,211.09 Paid in CARS : \$25,387.25 Receipts: \$0.00 Total: \$51,598.34



View Purchase Order Information - continued

Field Descriptions - continued

Acc Sys Encumbered Amt - Future use

Note: Data in this field will not match CARS for converted POs. Remaining balance is all that is shown, NOT original full contract cost.

Acc Sys Balance - Available unspent funds remaining for this contract, including prime and all subcontractors and amendment subcontractors

Acc Sys Paid to Date - Future use.

Description - Item description from the PeopleSoft PO line.

CARS Current Contract Cost - Sum of the contract cost lines for this contract from CARS records. This value is calculated from CARS data. Corresponding CARS field is **Current Total Cost**.

View Purchase Order Information					PO Originated in Legacy System Pre-PeopleSoft				
Purchase Order #: 3483109		Project ID: 1440-15-22		Contract #: 724100001		Work Order #:		Vendor: Inc.	
Active PO Lines - Active									
PO Line #: 1		PO Status: Active		PO Date: 07/01/2016		Account: 8700229		Class Field: 96100	
Dept ID: 1023244100		Program Code:		Vendor ID: 1239		Vendor Location: MAIN			
Requisition #: 0		Requisition Line #: 0		Acc Sys Encumbered Amt: 151134.12		Acc Sys Balance:		Acc Sys Paid to Date:	
Description: FOND DU LAC CO, STH 23, STH 67-USH 41				CARS Current Contract Cost: \$200,042.32		CARS Contract Balance: \$148,443.98		CARS Paid to Date:	
								Paid Externally : \$26,211.09	
								Paid in CARS : \$25,387.25	
								Receipts: \$0.00	
								Total: \$51,598.34	



View Purchase Order Information - continued

Field Descriptions - continued

CARS Contract Balance - Current cost minus all amounts paid. Paid amounts include those paid through CARS and those paid outside CARS. This value is calculated from CARS data

CARS Paid to Date: Data in these fields is calculated from CARS data.

Paid Externally - Contract cost amounts paid outside CARS.

Paid in CARS - Contract cost amounts paid through CARS invoices.

Receipts - Amounts repaid to WisDOT by the vendors, such as in cases where overhead adjustments result in contract overpayments.

Total - Sum of all amounts paid external to CARS, within CARS, and amounts repaid by the vendor (receipts).

View Purchase Order Information		PO Originated in Legacy System Pre-PeopleSoft		
Purchase Order #: 3483109	Project ID: 1440-15-22	Contract #: 724100001	Work Order #:	Vendor: Inc.
Active PO Lines - Active				
PO Line #: 1	PO Status: Active	PO Date: 07/01/2016	Account: 8700229	Class Field: 96100
Dept ID: 1023244100	Program Code:	Vendor ID: 1239	Vendor Location: MAIN	
Requisition #: 0	Requisition Line #: 0	Acc Sys Encumbered Amt: 151134.12	Acc Sys Balance:	Acc Sys Paid to Date:
Description: FOND DU LAC CO, STH 23, STH 67-USH 41		CARS Current Contract Cost: \$200,042.32	CARS Contract Balance: \$148,443.98	CARS Paid to Date: Paid Externally : \$26,211.09 Paid in CARS : \$25,387.25 Receipts: \$0.00 Total: \$51,598.34



Evaluations

Evaluations serve to describe the consultant’s performance and rate the quality of work. The Facilities Development Manual (FDM) in [chapter 8, section 25-5](#) states that evaluations are required at the completion of each contract or as needed for multi-year contracts for:

- All contracts with estimated totals of \$10,000 or more, including both full-service and specialty master contracts
- Individual work orders with estimated totals of \$10,000 or more on full-service master contracts

Evaluations are optional on work orders for specialty master contracts and full-service master contract work orders with estimated totals of less than \$10,000.

In CARS, evaluations are created by a WisDOT Project Manager and then routed to the consultant or to the subcontractor. The consultant or subcontractor can review and make comments on the evaluation, and then send it back to WisDOT. The general process flow is described in [Figure 2 Evaluation Process Flow](#) on page 129.

The FDM also states that evaluations should be signed and dated by both the WisDOT Project Manager and a consultant representative. These obligations are completed in CARS electronically when the Project Manager sets the evaluation status to “Ready for Review”, and when the consultant representative sets the evaluation status to “Consultant Reviewed”.

In order for the evaluations to be routed to the appropriate persons, the *Evaluator* (WisDOT) must be included in the **DOT Contacts** list, and the *Reviewer* (consultant firm) must be included in the **Consultant Contacts** list. If the appropriate person is not listed in the CARS list, please contact the CARS Administrator at WisDOTCARS@dot.wi.gov.

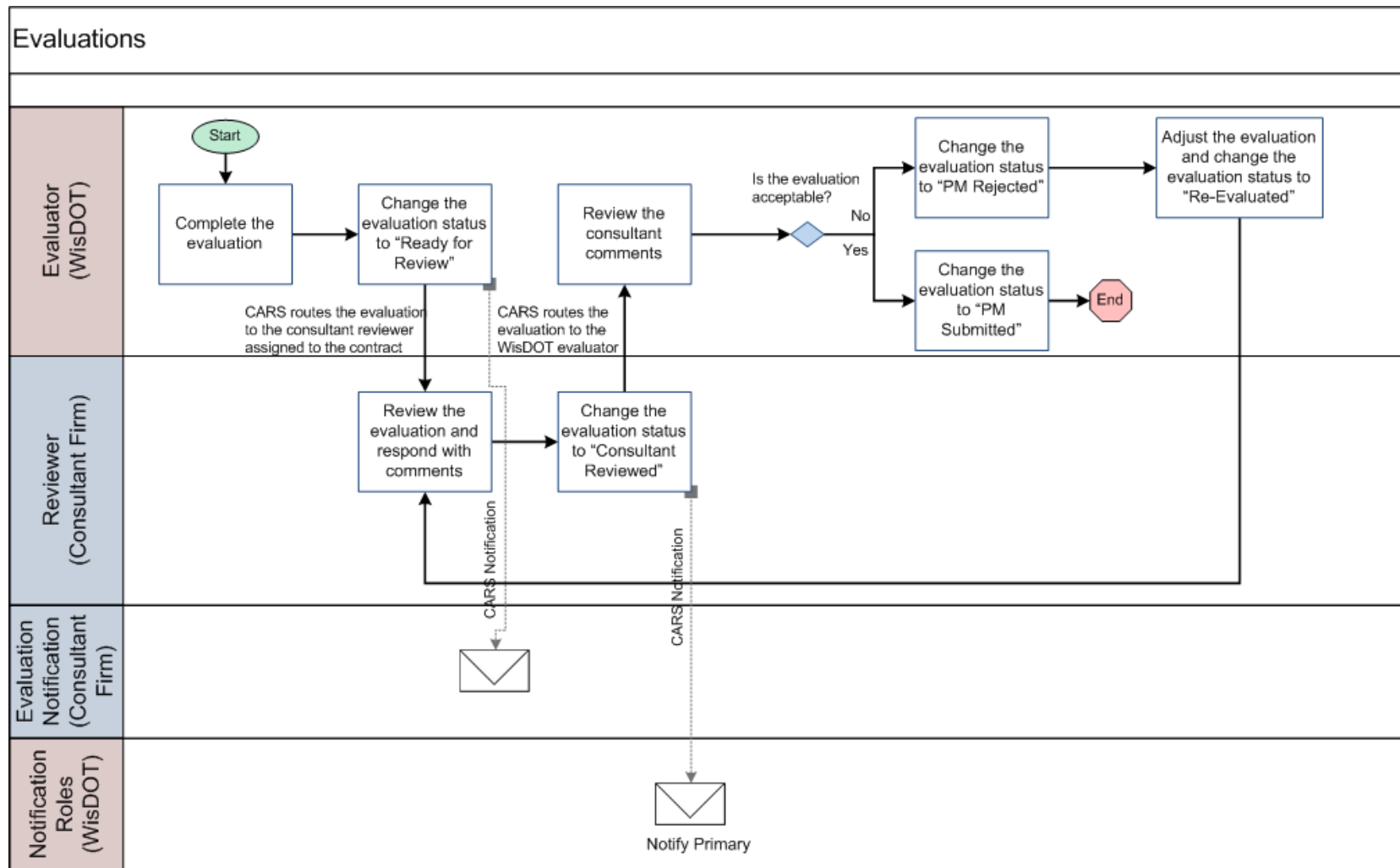
Email notifications are sent to consultants who have the Evaluation Notification role for the contract.

- When a DOT employee is the evaluation creator or the Evaluator listed on an evaluation, the evaluation is listed on the *Dashboard* page unless the evaluation has been sent to the consultant for review.
- When the consultant has the Evaluation Reviewer role for a contract (subcontractors need the Subcontract Evaluation Reviewer role), the evaluations will be listed on that person’s Dashboard page when the evaluation has been sent to the consultant for review. Consultants can have different access types for evaluations, including view-only, notification and reviewer.
- Evaluations cannot be added until the contract has a value in the **Date Authorized** field, which is in the **Contract Details** section of the *View Contract* page.

Evaluators may add comments to explain the ratings given for a specific category. Some regions require comments for every category.

Note: When a consultant’s or subcontractor’s work is rated “2” or lower (on a scale of 1-5 with “1” being the lowest rating), a comment in the evaluation is required by WisDOT. CARS will enforce this requirement in the future.





Prerequisites:

- Evaluator (WisDOT staff) must be added to the list of DOT Contacts by a CARS Administrator.
- Evaluator (WisDOT staff) must have the DOT Evaluation Editor role for the specific contract in order to view and manage evaluations.
- Reviewer (consultant staff) must be added to the list of Consultant Contacts by a CARS Administrator.
- Reviewer (consultant staff) must have the Vendor Evaluation Reviewer role for the specific contract or contract group in order to view and review evaluations.

Notes:

- Evaluations are not applied to master contracts. They are applied to the work orders associated with master contracts.
- Evaluations cannot be created until an Authorization Date is entered for the project or work order.
- WisDOT notification roles include Primary Notification and Secondary Notification. Secondary notifications are typically sent to supervisors at 20 days and later.

Figure 2 - Evaluation Process Diagram



Evaluation Statuses

CARS has seven possible statuses for evaluations. Each status can be assigned only at a specific stage of the evaluation process, and WisDOT users have different status choices than consultant users.

Status	Description
PM Created	WisDOT users: CARS assigns this status to new evaluations. The evaluation stays in PM Created status until the evaluation is ready to send to the consultant.
Ready for Review	WisDOT: Change an evaluation's status from "PM Created" to "Ready for Review" to send the evaluation to the consultant or subconsultant for review.
Consultant Reviewed	Consultant: Change an evaluation's status from "Ready for Review" to "Consultant Reviewed" to return the evaluation to WisDOT.
PM Submitted	WisDOT: Change an evaluation's status from "Consultant Reviewed" to "PM Submitted" to end the evaluation process.
PM Rejected	WisDOT: Change an evaluation's status from "Consultant Reviewed" to "PM Rejected" to start the evaluation process again. CARS automatically copies the rejected evaluation data into a new evaluation that has the next sequence number. This new evaluation has the status "Copied and Revised".
Copied and Revised	WisDOT: CARS assigns this status to the next sequential evaluation when the evaluator rejects an evaluation that has been reviewed by the consultant.
Re-Evaluated	WisDOT: Change an evaluation's status from "Copied and Revised" to "Re-Evaluated" when changes are made to the copied evaluation.



Evaluation Notifications

CARS automatically sends email notification to WisDOT and consultant users when the status of an evaluation is changed. Emails are routed to persons who have notification roles for the project ID. In addition, the evaluation will be listed on the appropriate user’s dashboard. The following table summarizes evaluation notifications. Links to the evaluations appear on the dashboard pages of users

<u>Status</u>	<u>Status changed by</u>	<u>Email sent to</u>	<u>Linked on Dashboard:</u>	
			<u>WisDOT</u>	<u>Consultant</u>
PM Created	--	--	Yes	No
Ready for Review	WisDOT	Prime consultants with the Invoice Notification role receive email immediately. If no vendor users have the evaluation notification role for this contract, the firm’s Vendor Administrator receives the email. If the evaluation is for a subcontract, emails are sent to both the prime and sub-consultants. The evaluation is linked on the subconsultant dashboard only.	No	Yes
Consultant Reviewed	Prime Consultants	WisDOT users with the Primary Notification role	Yes	No



WisDOT: Add Evaluation

1. Open the appropriate *View Contract* page:
 - Use a Favorite link on your dashboard.
 - Use the search tools (see page 25) to locate the contract.
2. Click **New Evaluation**. CARS displays a confirmation message if there is more than one project associated with the contract.
3. Click **Yes** or **No** to continue with the evaluation.

If you click **Yes**, the evaluation will be associated with all projects associates with the currently open contract. The contract ID is shown in the **Contract Number** field.

If you click **No**, the evaluation you are starting will apply only to the project that is currently open. The project ID is shown in the **Project ID** field.

If you click **X** (close), the new evaluation is cancelled.

Note: When you click **No**, the **Vendor** field on the *Edit/New Evaluation* page becomes the **Project/Vendor** field as shown in the inset on page 133 of this manual.

CARS opens the *Edit/New Evaluation* page.

WISCONSIN DEPARTMENT OF TRANSPORTATION
Doing Business ACPT
Home Contracts Master Group Vendors Solicitations DT25 Search Reports Tools Security Log Off
CARS - Contract Administration & Reporting System
JUSER Project, Contract or Master Contract: Search
View Contract Create Invoice Import Invoice **2** New Evaluation Edit Delete Print Page Favorite Go to Bottom
Contract Reports
Contract Information
Project ID: 7777-88-99 Contract Number: 140008062 New DT25
Contract Type: Regular Purchase Order Number:
Phases: 0 Contract Function: Construction Services
Staged Number: Program Code: 3031
Associated Projects
Nothing found to display.
Add Project

Confirmation Required
Contract level Evaluation's are recommended.
Is this a Contract level Evaluation?
Yes **3** No



WisDOT: Add Evaluation - continued

4. Enter the required information in the **Evaluation Information** section:
 - a. **Processing Status Date**
 - b. **Evaluation Type** - Select one of the following:
 - Final Evaluation
 - Intermediate Evaluation
 - Revised Final Evaluation
 - c. **Percent of work completed**
 - d. **Vendor** - If you click **Yes** to answer the confirmation question, the name of the vendor selected for the contract is automatically entered.
If you click **No** to answer the confirmation question, this field is called **Project/Vendor**.
 - e. **Full Scope Evaluation** - Defaults to "Yes".
 - f. **Evaluation Function** - Select the contract function. This option determines the questions available for the Evaluation Category Questions
 - g. **Evaluation Period From**
 - h. **Evaluation Period To**

Edit/New Evaluation

* Indicates required field

Evaluation Information

Processing Status: PM Created

a Processing Status Date: * 11/02/2015

b Evaluation Type * Final Evaluation

c Percent of work completed: * 100

d Vendor: * Osage & Co. Contract Level Evaluation = No

e Full Scope Evaluation? * Yes

f Evaluation Function: * Construction

g Evaluation Period From: * 08/03/2015 **h** To: * 11/25/2015

Project / Vendor: * 8484-87-87/Osage & Co.

Categories and Ratings

1 = Unacceptable 2 = Below average 3 = Satisfactory 4 = Above average 5 = Outstanding

Category	Rating(1-5)	Evaluator Comments	Reviewer Comments
1) Project Management	5		
2) Human Relations			
3) Technical Skills	5		
4) Quality Of Work	5		
5) Cost Control (for Construction Only)	4		
6) Timeliness			
Overall Evaluation rating:	4.67		

7 Next Cancel



WisDOT: Add Evaluation - continued

- Enter numerical ratings for each relevant evaluation category in the **Rating** fields. Use the rating scale shown at the top of the section. You can enter fractional rating values with one decimal place, such as "4.5".

If one of the six categories does not apply, leave the field blank. If you do not enter a rating, then the evaluation questions for that category will not be listed on the *Evaluation Category Questions* page. CARS displays the average of the ratings at the bottom of the column in the **Overall Evaluation rating** field.

- Add comments in the **Evaluator Comments** fields. The maximum length of the comments is 4000 characters; a counter displays under the field when you start typing.

Note: Your region or WisDOT may require comments.

- Click **Next**.

Edit/New Evaluation

* Indicates required field

Evaluation Information

Processing Status:
PM Created

a Processing Status Date: *

b Evaluation Type *

c Percent of work completed: *

Contract Level Evaluation = No

d Vendor: *
 Project / Vendor: *
8484-87-87/Osage & Co.

e Full Scope Evaluation? *

f Evaluation Function: *

g Evaluation Period From: * **h** To: *

Categories and Ratings

1 = Unacceptable 2 = Below average 3 = Satisfactory 4 = Above average 5 = Outstanding

Category	Rating(1-5)	Evaluator Comments	Reviewer Comments
1) Project Management	<input type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
2) Human Relations	<input type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
3) Technical Skills	<input type="text" value="5"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
4) Quality Of Work	<input type="text" value="5"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
5) Cost Control (for Construction Only)	<input type="text" value="4"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
6) Timeliness	<input type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Overall Evaluation rating:	<input type="text" value="4.67"/>		

7



WisDOT: Add Evaluation - continued

- CARS opens the *Evaluation Category Questions* page. If you did not enter a rating for the category on the *Edit/New Evaluation* page, the category and related questions are not listed on this page. Select the answer to each question about the details of the firm's performance. The answer choices are:
 - Exceeds
 - Improvement Needed
 - N/A (not applicable)
 - Satisfactory
- Click **Next**.

Note: Click **Back** to return to the *Edit/New Evaluation* page to make changes or add more category question sections.

Evaluation Category Questions

If there are no questions to answer for a selected category ,then category ranking will not be considered.

* Indicates required field

5) Cost Control (for Construction Only)

Please select the answer to the question as appropriate.

Did project result in the expenditure of reasonable time as defined or scoped?	<input type="text" value="Improvement Needed"/>
Was the consultant creative in controlling their own costs and developing efficiencies?	<input type="text" value="Satisfactory"/>
Did the consultant minimize contractor overruns and/or change orders when possible?	<input type="text" value="N/A"/>



WisDOT: Add Evaluation - continued

10. Verify that the name of the consultant staff member shown in the **Reviewer - Consultant** field is correct. CARS automatically enters the name of the person listed as consultant contact on the contract. Any reviewer you select must be listed in CARS as a consultant contact.
11. Verify that the name of the WisDOT employee shown in the **Evaluator - WISDOT** field is correct. CARS automatically enters the name of the person listed as Project Manager on the contract. Any evaluator you select must be listed in CARS as a DOT contact.
12. Select a “Yes” or “No” answer in the **Would you have reservation selecting this firm again for this type of project?** field. The default answer is “No”.
13. Enter any comments you wish to add in the **Overall Evaluator Comments** field.
14. Select a “Yes” or “No” answer in the **Was this Evaluation done at a face-to-face meeting?** field. The default answer is “No”.
15. Enter the location and date of the review in the **Discussion Location/Date** field.

WISCONSIN DEPARTMENT OF TRANSPORTATION
Doing Business ACPT

Home Contracts Master Group Vendors Solicitations DT25 Search Reports Tools Security Log Off

CARS - Contract Administration & Reporting System

JUSER Project, Contract or Master Contract: Search

Evaluation Details

Back

Evaluation Details

1.0 Reviewer - Consultant: *
Smith, Adam

1.1 Evaluator - WISDOT *
Lane, JC

Eval PDF File

1.2 Would you have reservation selecting this firm again for this type of project? *
No

1.3 Overall Evaluator Comments:

Overall Reviewer Comments:

1.4 Was this Evaluation done at a face-to-face meeting? *
No

1.5 Discussion Location / Date

1.6 Save Cancel



WisDOT: Add Evaluation - continued

- Click **Save**. CARS saves the evaluation with the status set to “PM Created”. This status means that the evaluation is saved, but it has not been sent to the consultant reviewer.

Note: The **Eval PDF File** field was used for evaluations entered during the transition into CARS and electronic-only evaluations. If applicable, it contains the name of the PDF version of the paper evaluation that was saved for future reference. These files are stored on the WisDOT network. This field is no longer used.

WISCONSIN DEPARTMENT OF TRANSPORTATION
Doing Business ACPT

Home Contracts Master Group Vendors Solicitations DT25 Search Reports Tools Security Log Off

CARS - Contract Administration & Reporting System

JUSER Project, Contract or Master Contract: Search

Evaluation Details

Back

10 Reviewer - Consultant: *

11 Evaluator - WISDOT *

Eval PDF File

12 Would you have reservation selecting this firm again for this type of project? *

13 Overall Evaluator Comments:

Overall Reviewer Comments:

14 Was this Evaluation done at a face-to-face meeting? *

15 Discussion Location / Date

16 Save Cancel



WisDOT: Send Evaluation to Consultant Reviewer

- Open the *View Evaluation* page for the evaluation that has the status “PM Created”:
 - On the *Dashboard* page, click the **Seq No** link in the **Evaluations** section
 - OR –
 - On the *View Contract* page, click **View Evaluation** (not illustrated).
 - If there are other evaluations for this contract, click the link in the **Evaluation No** column in the **Evaluations List** table.
- Click **Edit** on the *View Evaluation* page.
- Add or change any information as needed.

Note: Click **Next** or **Back** on the pages to view the entire evaluation.

- On the *Evaluation Details* page, change the value in the **Processing Status** field to “Ready for Review”. This status means that the evaluation is saved, and it will be sent to the consultant reviewer when you click **Save**.

▼ **Evaluations**

8 items found, displaying all items. 1

Seq No	Evaluator Name	Contract / Master	Level /Project Id /WO #	Processing Status / Date	Evaluation Period	Type	Function	Full Scope
1	J User	1400006322	Full Contract	Consultant Reviewed / 2014-05-05	04/30/2014 to 05/02/2014	Intermediate Evaluation	Construction	Yes
1 3	J User	1400006423	Full Contract	PM Created / 2014-07-15	06/25/2014 to 06/30/2014	Intermediate Evaluation	Construction	Yes

Evaluations List

Contract Number: 1400006423

3 items found, displaying all items. 1

Evaluation No	Level / Project	Vendor	Evaluation Processing Status / Date	Evaluation Type	Evaluation Function	Full Scope
1	Full Contract	Osage	PM Rejected / 2014-06-26	Intermediate Evaluation	Design	Yes
2	Full Contract	Osage	PM Submitted / 2014-06-26	Intermediate Evaluation	Design	Yes
1 3	Full Contract	Osage	PM Created / 2014-07-15	Intermediate Evaluation	Construction	Yes

View Evaluation

← Back To Dashboard Edit Delete Print Page

▼ **Contract Information**

Contract Number:
1400006423

Evaluation Number:

Evaluation Details

Back

Evaluation Details

Reviewer - Consultant: *
Smith, Adam

Evaluator - WISDOT: *
Lane, JC

Final PDF File

4 Processing Status: *
Ready for Review

5 Save Cancel



Send Evaluation to Consultant Reviewer - continued

5. Click **Save**.

CARS sends the evaluation to the consultant. CARS also changes the status of the evaluation to “Ready for Review” and removes the evaluation from the **Evaluations** section on your dashboard. WisDOT users can still access the evaluation through the *View Contract* page.

CARS also lists the evaluation on the Consultant Reviewer’s dashboard and sends email notifications to consultants who have the Evaluation Notification role for this contract.

Evaluation Details

Back

Evaluation Details

Reviewer - Consultant: *
Smith, Adam

Evaluator - WISDOT *
Lane, JC

Final PDF File

4 Processing Status: *
Ready for Review

5 Save Cancel



Consultants: Review Evaluation

1. On the *Dashboard* page in the **Evaluations** section, click the link in the **Seq No** column. CARS opens the *View Evaluation* page for the new evaluation:
2. Review the evaluation information.
3. Click **Edit**.

WISCONSIN DEPARTMENT OF TRANSPORTATION
Doing Business ACPT
 Home Search Security Log Off

CARS - Contract Administration & Reporting System

JOHNKANE - John Kane processing on behalf of Osage Project, Contract or Master Contract: Search

- Prime Contracts
- Sub-Contracts
- Amendment SubContracts
- Invoices
- Evaluations**
 - One item found. 1

Seq No	Reviewer	Contract / Master	Level /Project Id /WO #	Processing Status / Date	Evaluation Period	Type	Function	Full Scope
1	John,Kane	1400006402	Full Contract	Ready for Review / 2014-06-30	05/01/2014 to 05/30/2014	Intermediate Evaluation	Construction	Yes

WISCONSIN DEPARTMENT OF TRANSPORTATION
Doing Business ACPT
 Home Search Security Log Off

CARS - Contract Administration & Reporting System

JOHNKANE - John Kane processing on behalf of Osage Project, Contract or Master Contract: Search

View Evaluation ← Back To Dashboard Edit Print Page

- Contract Information**
 - Contract Number: 1400006402
 - Evaluation Number: 1
 - Vendor: Osage



Consultants: Review Evaluation - continued

- Verify that the name in the **Reviewer - Consultant** field is correct. Follow your firm's guidelines for who should be listed in this field if more than one person reviews the evaluation.

- Add general summary comments in the **Overall Reviewer Comments** field. You can add overall comments or comments for a specific category. Each field will accept up to 4000 characters, and a character counter displays when you start typing.

Note: Click **Next** or **Back** on the pages to review the entire evaluation.

- Add any responses to the Categories and Ratings scores and comments in the **Reviewer Comments** field.
- When you are satisfied with your comments and are ready to return the evaluation to WisDOT, change the status from "Ready for Review" to "Consultant Reviewed" in the **Processing Status** field.

Edit Evaluation

* Indicates required field

Evaluation Information

Evaluation On: Contract	Percent Work Completed: 100.0
Processing Status: Full Scope?	

Evaluation Details

Overall Evaluation Rating: 5.0

4 **Reviewer - Consultant:** *
Smith, Adam

Evaluator - WISDOT: Lane JC
Eval PDF File

Comments and Summation

Describe strengths / weaknesses and provide suggestions for improvement.

Overall Evaluator Comments:

5 **Overall Reviewer Comments:**

Would you have reservation selecting this firm again for this type of project? No

Was this Evaluation done at a face-to-face meeting? No

Discussion Location / Date:

Categories and Rating

6) Timeliness
Rating: 5.0

Question & Answers

Did consultant effectively work with the contractor in coordinating the utility and other work by local agencies? Exceeds

Did consultant keep the Department informed of project work? Exceeds

Did consultant submit complete details of financial proposal with relevant infrastructure requirements and contract fees?

Evaluator Comments:

6 **Reviewer Comments:**

7 **Processing Status:** *
Consultant Reviewed

8 Save Cancel



Consultants: Review Evaluation - continued

- Click **Save**. CARS submits the reviewed evaluation to WisDOT and removes the evaluation from the **Evaluations** section on your dashboard.

CARS also lists the evaluation on the WisDOT Evaluator's dashboard and sends email notification to consultants who have the Evaluation Notification role for this contract.

Note: Also use this process to route "Re-Evaluated"-status evaluations to WisDOT.

Edit Evaluation

* Indicates required field

Evaluation Information

Evaluation On: Contract	Percent Work Completed: 100.0
Processing Status: Full Scope?	

Evaluation Details

Overall Evaluation Rating: 5.0

4 Reviewer - Consultant: *
Smith, Adam

Evaluator - WISDOT: Lane JC

Eval PDF File

Comments and Summation

Describe strengths / weaknesses and provide suggestions for improvement.

Overall Evaluator Comments:

5 Overall Reviewer Comments:

Would you have reservation selecting this firm again for this type of project? No

Was this Evaluation done at a face-to-face meeting? No

Discussion Location / Date:

Categories and Rating

6) Timeliness

Rating: 5.0

Question & Answers

Did consultant effectively work with the contractor in coordinating the utility and other work by local agencies? Exceeds

Did consultant keep the Department informed of project work? Exceeds

Did consultant submit complete materials in accordance with the contract specifications and conditions? Exceeds

Evaluator Comments:

6 Reviewer Comments:

7 Processing Status: *
Consultant Reviewed

8 Save Cancel



WisDOT: Submit Evaluation

1. Open the *View Evaluation* page for an evaluation that has the status “Consultant Reviewed”:
 - On the *Dashboard* page, click the **Seq No** link in the **Evaluations** section

– OR –

 - On the *View Contract* page, click **View Evaluation**. Then click the link in the **Evaluation No** column in the **Evaluations List** table.
2. Click **Edit**.
3. Add or change any information as needed.
4. Click **Next** on the *Edit/New Evaluation* page and on the *Evaluation Category Questions* page.

Note: Click **Next** or **Back** on the pages to view the entire evaluation.

5. Select “PM Submitted” in the **Processing Status** field on the *Evaluation Details* page.
6. Click **Save**. CARS removes the evaluation from the **Evaluations** section on your dashboard. WisDOT users can still access the evaluation through the *View Contract* page.

Evaluation No	Level / Project	Vendor	Evaluation Processing Status / Date	Evaluation Type	Evaluation Function	Full Scope
1	Full Contract	Osage	Consultant Reviewed / 2014-06-30	Intermediate Evaluation	Construction	Yes



WisDOT: Reject Evaluation

- Open the *View Evaluation* page for an evaluation that has the status “Consultant Reviewed”:
 - On the *Dashboard* page, click the **Seq No** link in the **Evaluations** section
- OR –
- On the *View Contract* page, click **View Evaluation**. Then click the link in the **Evaluation No** column in the **Evaluations List** table.
- Click **Edit**.
- Add or change any information as needed.
- Click **Next** on the *Edit/New Evaluation* page and on the *Evaluation Questions* page.

Note: Click **Next** or **Back** on the pages to view the entire evaluation.

- Select “PM Rejected” in the **Processing Status** field on the *Evaluation Details* page.
- Click **Save**. CARS changes the status of the evaluation to “Copied and Revised” and increases the sequence number. The evaluation remains on the WisDOT Evaluator’s dashboard.

After the evaluation has been revised, change the status to “Re-Evaluated” to send the evaluation back to the consultant for review. The sequence number is not increased.

▼ Evaluations

7 items found, displaying all items. 1

Seq No	Evaluator Name	Contract / Master	Level /Project Id /WO #	Processing Status / Date	Evaluation Period	Type	Function	Full Scope
1	J User	1400006311	Full Contract	Consultant Reviewed / 2014-05-01	05/01/2014 to 05/01/2014	Intermediate Evaluation	Design	Yes
2	J User	1400006402	Full Contract	Consultant Reviewed / 2014-06-30	05/01/2014 to 05/30/2014	Intermediate Evaluation	Construction	Yes

Evaluation Details

Back

Evaluation Details

Reviewer - Consultant: *
Smith, Adam

Evaluator - WISDOT *
[Name]

5 Processing Status: *
PM Rejected

6 Save Cancel

▼ Evaluations

7 items found, displaying all items. 1

Seq No	Evaluator Name	Contract / Master	Level /Project Id /WO #	Processing Status / Date	Evaluation Period	Type	Function	Full Scope
1	J User	1400006322	Full Contract	Consultant Reviewed / 2014-05-05	04/30/2014 to 05/02/2014	Intermediate Evaluation	Construction	Yes
3	J User	1400006402	Full Contract	Copied and Revised / 2014-06-30	05/01/2014 to 05/30/2014	Intermediate Evaluation	Construction	Yes



APPENDICES

- 1 - [System Requirements and Compatibility Settings](#)
- 2 - [CARS Access Request Form](#)
- 3 - [WisDOT Roles and Actions in CARS](#)
- 4 - [Vendor Roles and Actions in CARS](#)
- 5 - [Regional Administrator Instructions](#)
- 6 - [Vendor Administrator Instructions](#)
- 7 - [Reports](#)
- 8 - [Sample Invoices in CARS and PDF of Submitted Invoice](#)
- 9 - [Invoice Sections](#)
- 10 - [Sample Evaluations](#)
- 11 - [Expenditure Accounting Instructions](#)
- 12 - [Determine Contract Status](#)
- 13 - [Import XML Invoice](#)
- 14 - [Save Invoice Documents as PDF/A](#)



APPENDIX 1 System Requirements and Compatibility Settings

CARS and Internet Explorer

Internet Explorer Version: CARS is designed Internet Explorer 10 and is compatible with Internet Explorer 11. This section describes actions you can take to use CARS more effectively.

Internet Explorer Buttons: It is recommended that you avoid using the Internet Explorer buttons while working in CARS. The Internet Explorer **Back** and **Forward** buttons may not affect the CARS application as expected. Use the navigation buttons provided in CARS to ensure that you navigate in the application correctly. If you don't see a button that will open the page you want, click **Home** and locate the page

Internet Explorer Tabs: CARS users must be sure to log off and close Internet Explorer, especially if users share computers. User credentials can persist in an Internet Explorer session, and the risk of accidental account sharing is greatest when users who have multiple tabs open simply close the CARS tab. In this case, if CARS is opened on a new tab, the last user is automatically logged on.

If you have reason to open multiple copies of CARS, the current user on the first tab is automatically logged on when you create a new tab in Internet Explorer and open CARS. You must open a separate copy (session) of Internet Explorer before you can log on as a different user.




Compatibility View

Sometimes pages in CARS might not display like you expect them to or you might have other problems with CARS, especially if the browser you are using is not Internet Explorer 10 or higher. If text or fields overlap or fields (especially large fields) are disordered on the page, there are two possible causes:

1. The current window size is too small for the page.
2. There is a compatibility problem between Internet Explorer and the CARS page.

The solution for the first cause is to simply enlarge or maximize the window.

If there is a compatibility problem, the **Compatibility View** button  appears on the **Address** bar. This means the page was probably coded for a different version of Internet Explorer than the one you have, or even for a different browser. If there is no compatibility problem, this button will not appear.

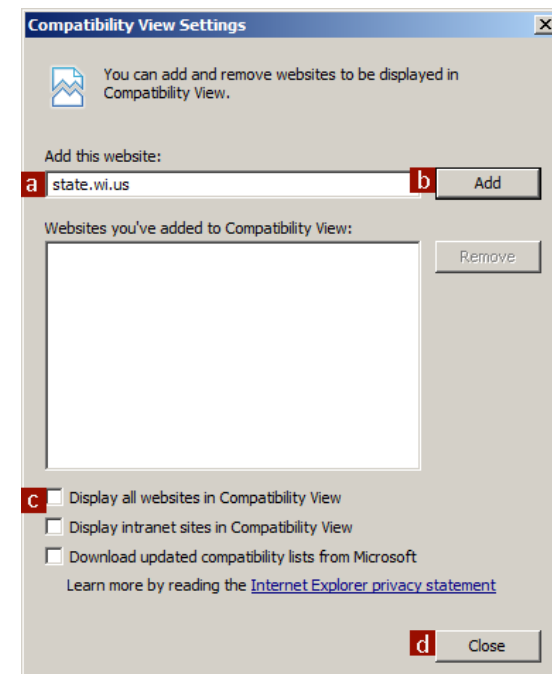
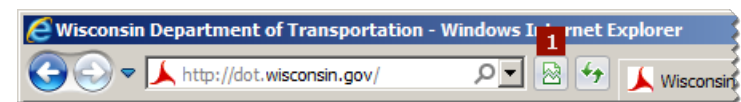
There are two simple methods for correcting compatibility conflicts.

3. Click **Compatibility View** on the Internet Explorer **Address** bar. The button will change in appearance, depending on your settings. Internet Explorer will now show this page in compatibility view every time you open it until you turn off Compatibility View.
4. On the Internet Explorer **Menu** bar, point to **Tools**, and then click **Compatibility View Settings** to open the Compatibility Settings dialog box.

Note: If the **Menu** bar is not displayed, right-click the **Address** bar, and then click **Menu bar**.


- a. Verify that the correct website is listed in the **Add this website** field.
- b. Click **Add**.
- c. *Recommended:* You can select **Display all websites in Compatibility View** to automatically turn on Compatibility View for every website you visit.
- d. Click **Close**.

For more information about Compatibility View, visit



APPENDIX 2 CARS Access Request Form

Wisconsin Department of Transportation



CONTRACT ADMINISTRATION AND REPORTING SYSTEM (CARS) REQUEST FOR ACCESS
DT1622 10/2014

Email Questions to: WisDOTCARS@dot.wi.gov
Click to Request a: [WAMS ID](#)

Step 1 – Access Request Type (select only one)

WisDOT Employee
 WisDOT Regional Administrator
 Management Consultant
 Consultant Administrator (up to 2 people per firm)

Step 2 – Complete the information in Section A. This information is required for ALL requests.

SECTION A – APPLICANT INFORMATION	Date of Application (m/d/yyyy)
Access Request Type:	Federal Employer Identification Number (FEIN) <i>Required for Management Consultant and Consultant Administrator Requests Only</i>
<input type="checkbox"/> Create Account	
<input type="checkbox"/> Update Account	
<input type="checkbox"/> Delete Account	
Applicant Name (Last, First, MI)	WI Access Management System (WAMS) User ID
Consultant Firm – Name of Unit of Government	Applicant Email Address
Address, City, State, ZIP Code	(Area Code) Telephone Number

I acknowledge that if I divulge my password or give access to any of my privileges to unauthorized persons, I may be subject to User Agency disciplinary action and/or prosecution under provisions of a 943.70 Wis. Stats. However, I understand that I may be required to give this information to WisDOT Security Officer for logon ID problem resolution. The Contract Administration and Reporting System is for authorized users only; system access is monitored. By using this system, I expressly consent to this monitoring. Evidence of unauthorized access will be provided to the appropriate law enforcement agencies.

X (Applicant Signature – Electronic Signature, Brush Script font) _____ (Date – m/d/yyyy)

Step 3 – WisDOT Employee Requests Only. Complete the information in Section B.

SECTION B – ROLES

Consultant Roles

- Consultant user access is configured by the firm's Consultant Administrators. Users other than Management Consultants and Consultant Administrators do not need to submit this form.
- Management Consultant access is configured by WisDOT Regional Administrators. No further information is needed on this form.

WisDOT Employee Roles (Select all that apply) "View" access means the person can see records, but cannot change them.

View Contracts (allows user to view contracts) Evaluation Editor (allows user to manage evaluations)
 View Evaluations (allows user to view evaluations) Invoice Editor (allows user to manage invoices)
 View Invoices (allows user to view invoices) Invoice Reviewer (allows user to manage and review invoices, but not approve them)
 Invoice Approver (allows user to manage, adjust and approve invoices)

Step 4 – Submit Request for Access to: WisDOTCARS@dot.wi.gov

For CARS Security Internal Use Only	Date (m/d/yyyy)
Section C – To be completed by CARS Security Administrator	
Request Completed By	
Notes	



APPENDIX 3 WisDOT Roles and Actions in CARS

DOT Roles

<u>DOT Role</u>	<u>Associated Actions</u>	<u>Purpose</u>
DOT Staff	View Contracts	For all WisDOT users. This role is automatically assigned to all WisDOT users when the user's WAMS ID is added to CARS. WisDOT users have read-only access to every contract, but cannot carry out any other actions without additional roles, which are assigned on a contract-by-contract basis by a Regional Administrator or a CARS Administrator.
View Evaluations	View Evaluation	Allows WisDOT users read-only access to evaluations for a specific contract.
View Invoices	View Contracts View Invoices	Allows WisDOT users read-only access to invoice information for a specific contract. No changes are permitted.
Evaluation Editor	View Contracts View Evaluations Manage Evaluations	Allows WisDOT users to create evaluations and review consultant responses to evaluations for a specific contract. This role causes the evaluation to be listed on the user's dashboard.
Invoice Editor	View Contracts View Invoices Manage Invoices	Allows WisDOT users to view consultant-submitted invoices. They can also create invoices and edit "draft" status invoices created by WisDOT, but not vendor-created invoices in "draft" status. This role does not allow the review, adjustment, rejection or approval of consultant-submitted invoices.
Invoice Approver	View Contracts View Invoices Manage Invoices Invoice Approver	Allows WisDOT users to adjust, reject and approve invoices for payment. This role causes the invoice to be listed on the user's dashboard.
Invoice Reviewer	View Contracts View Invoices Invoice Auditor	Allows WisDOT users to review invoices. This role allows the user to change the invoice status to "Reviewed" and to adjust invoice lines. It does not allow rejection or approval of invoices.
Notify Primary	Email Primary	Future use. For WisDOT users who are responsible for day-to-day activities for a specific project. These users receive email notification (day 1) when invoices and evaluations are sent by consultants. If invoices and evaluations that are not acted upon within 10 days, a second email is generated. Additional email notifications are generated at day 20 and every day thereafter if the invoice remains in "Submitted" status or if the evaluation remains in "Consultant Reviewed" status.



<u>DOT Role</u>	<u>Associated Actions</u>	<u>Purpose</u>
Notify Secondary	Email Secondary	Future use. For WisDOT supervisors who are responsible for specific projects. These users receive email notification if invoices and evaluations that are not acted upon within 10 days. Additional email notifications are generated at day 20 and every day thereafter if the invoice remains in "Submitted" status or if the evaluation remains in "Consultant Reviewed" status.
DOT Regional Admin	Manage DOT Staff	Designated Regional Administrators only. These administrators assign roles for WisDOT contracts and work orders, but not for Local Program contracts.
Local Program Reviewer	Manage Local Programs	Management Consultants only. These users are vendor users who manage contracts for WisDOT.
Expenditure Accountant	View Contracts Manage Financial Info	Expenditure Accounting only. These users are responsible for specialized functions, such as approving purchase order requisitions and paying invoices.
Selection Reviewer	View Contracts Approve NOI Selection	Consultant Services only. Future use.
NOI Reviewer	View Contracts Maintain NOI Approve NOI Selection	Consultant Services only. Future use.
NOI Specialist Editor	View Contracts Manage Solicitation NOI Info	Consultant Services only. Future use.
Run Batch Jobs	Run batch jobs for PeopleSoft interface	PeopleSoft interface use only. No user should have this role assigned.
DOT Editor	View Contracts View Evaluations Manage Updates	Consultant Services only. These users are able to create, update and delete contract records.



<u>DOT Role</u>	<u>Associated Actions</u>	<u>Purpose</u>
DOT Admin	View Contracts View Evaluations Manage Updates Manage Evaluations View Invoices Manage Invoices Invoice Approver Invoice Auditor Manage Application Maintain NOI Manage Solicitation NOI Info Approve NOI Selection Manage DOT Staff	DOT CARS Administrators only. These users have broad access to CARS records.



DOT Actions

DOT Action	Function
View Contracts	Allows WisDOT users to view contracts, but not to change, create or delete contracts. Assigned to all WisDOT users by default.
View Evaluations	Allows WisDOT user to view evaluations, but not to change, create or delete evaluations.
Manage Evaluations	Allows WisDOT user to change, create or delete evaluations.
Manage Updates	Allows WisDOT user to change, create or delete contracts, work orders and projects.
View Invoices	Allows WisDOT user to view invoices, but not to change, create or delete invoices.
Manage Invoices	Allows WisDOT user to change, create or delete invoices.
Invoice Approver	Allows WisDOT user to approve invoices for payment.
Invoice Auditor	Allows WisDOT users to adjust invoice lines and to mark the invoice as “Reviewed”.
Manage Solicitation NOI Info	Allows the WisDOT user to change, create or delete solicitations and notices of intent.
NOI Reviewer	Allows the WisDOT user to respond to a firm’s NOI. The staff member can edit specific NOI fields, but others are read-only.
Approve NOI Selection	Allows the WisDOT user to approve vendor selection for a contract or work order.
Manage Local Programs (Management Consultant)	Allows a CONSULTANT user to view contracts with the Program Management flag set to “Management Consultant”.
Manage Regional Assignments	Allows a WisDOT user to manage Management Consultant users, groups and contracts.
Manage Financial Info	Allows the Division of Business Management Expenditure Accounting staff to review and pay invoices.
Email Primary	Designates WisDOT users who are to receive initial (day 1) email notification for invoice submittals and evaluations returned by consultants. A second email is generated at day 10 if no action has occurred on the invoice or evaluation. More emails are generated at day 20 and every day thereafter if the invoice remains in “Submitted” status or if the evaluation remains in “Consultant Reviewed” status.
Email Secondary	Designates WisDOT users who are to receive email notification at day 20 and every day thereafter if the invoice remains in “Submitted” status or if the evaluation remains in “Consultant Reviewed” status.
Run Batch Jobs	CARS-PeopleSoft interface use only.



APPENDIX 4 Vendor Roles and Actions in CARS

Vendor Roles

<u>Vendor Role</u>	<u>Associated Actions</u>	<u>Purpose</u>
Vendor Staff	Vendor Access	Required for vendor access to CARS. This role is automatically assigned to all vendor users when the user's WAMS ID is added to CARS.
Vendor Administration	Manage Staff Assignments Evaluation Notification Invoice Notification	For administrators responsible for assigning staff member access. These users also receive evaluation and invoice email notifications when no other user has these roles for a project.
View Contracts	View Contracts	For staff members who need only to view contract information.
View Evaluations	View Contracts View Evaluations	For staff members who need to view evaluations for contracts.
Evaluation Notification	Evaluation Notification	For staff members who need to know when evaluations are received.
Evaluation Reviewer	View Evaluations Evaluation Reviewer	For staff members who need to review and respond to DOT evaluations of contract work.
View Invoices	View Contracts View Invoices	For staff members who need to view contract invoice information.
Invoice Notification	Invoice Notification	For staff members who need to know when invoices are sent. May also be applied to specific subcontracts and amendment subcontracts.
Invoice Submitter	View Contracts View Invoices Manage Invoice Invoice Submitter	For senior staff members who are responsible for reviewing invoices and billing the DOT.
Invoice Editor	View Invoices Manage Invoice	For staff members who prepare contract invoices.
Subcontract Invoice Editor	Manage Subcontract Invoice	For staff members who prepare subcontractor invoices. May also be applied to specific amendment subcontracts.
Subcontractor Invoice Submitter	Manage Subcontract Invoice Subcontract Invoice Submitter	For staff members responsible for reviewing subcontractor invoices and billing the DOT. May also be applied to specific amendment subcontracts.
View Subcontracts	View Subcontracts	For staff members who need to view subcontract information. May also be applied to specific amendment subcontracts.
View Subcontract Evaluations	View Subcontracts View Subcontractor Evaluations	For staff members who need to view evaluations for subcontracts. May also be applied to specific amendment subcontracts.



<u>Vendor Role</u>	<u>Associated Actions</u>	<u>Purpose</u>
Subcontract Evaluation Reviewer	View Subcontractor Evaluations Subcontractor Evaluation Reviewer	For staff members who need to review and respond to DOT evaluations of subcontract work. May also be applied to specific amendment subcontracts.
View Subcontract Invoice	View Subcontracts View Subcontractor Invoices	For staff members who need to view subcontract invoice information. May also be applied to specific amendment subcontracts.



Vendor Actions

<u>Vendor Action</u>	<u>Function</u>
Vendor Access	Allows the user access to CARS.
Manage Staff Assignments	Allows a staff member to assign and edit roles assigned to other staff members.
View Contracts	Allows a staff member to view specific contracts, but not to change, create or delete contracts.
View Evaluations	Allows a staff member to view specific evaluations, but not to change, create or delete evaluations.
Evaluation Notification	Designates the user who receives automatic email notification when evaluations are received from WisDOT. Messages are sent to the email address in the profile record for this user.
Evaluation Reviewer	Allows a staff member to respond to evaluator comments on contract evaluations and return the evaluations to WisDOT. The staff member can edit specific evaluation fields, but others are read-only.
View Invoices	Allows a staff member to view invoice information, but not to change, create or delete invoices.
Invoice Notification	Designates the user who receives automatic email notification when invoices are paid or rejected by WisDOT. Messages are sent to the email address in the profile record for this user.
Invoice Submitter	Allows a staff member to send invoices for their firm to the DOT Project Manager.
Manage Invoice	Allows the staff member to change, create or delete invoices.
View Subcontracts	Allows the staff member to view subcontractor contracts, but not to change, create or delete subcontractor contracts.
View Subcontractor Evaluations	Allows a staff member to view specific subcontractor evaluations, but not to change, create or delete subcontractor evaluations.
Subcontractor Evaluation Reviewer	Allows a staff member to respond to evaluator comments on subcontract evaluations and return the evaluations to WisDOT. The staff member can edit specific evaluation fields, but others are read-only.
View Subcontractor Invoices	Allows the staff member to view specific subcontractor invoices, but not to change, create or delete them.
Manage Subcontract Invoice	Allows the staff member to change, create or delete subcontractor invoices in draft status.
Subcontract Invoice Submitter	Allows a staff member to send invoices for their subcontractors to the DOT Project Manager.



APPENDIX 5 Regional Administrator Instructions

Regional Administrators are responsible for maintaining project access in CARS for WisDOT employees in their regions and bureaus. They can add users who have valid WAMS IDs as WisDOT users and assign roles for specific contracts to them. They are also responsible for maintaining overall user access when certain events occur. If you need help or have questions about roles or user access, please contact the CARS Administrator (WisDOTCARS@dot.wi.gov).

Roles Regional Administrators can assign to WisDOT users are described in the following table.

Role	Actions	Details
Evaluation Editor	View Contracts View Evaluations Manage Evaluations	Can create evaluations and review evaluations returned by consultants. When this role is assigned for a specific project, evaluations for the project will be listed on the WisDOT user's dashboard when the status is "PM Created" and "Consultant Reviewed."
Invoice Approver	View Contracts View Invoices Manage Invoices Invoice Approver	Can adjust, reject or approve invoices for payment. Cannot mark an invoice as "reviewed." When this role is assigned for a specific project, invoices for the project will be listed on the WisDOT user's dashboard when the consultant submits them and when Expenditure Accounting returns the invoice to the approver.
Invoice Editor	View Contracts View Invoices Manage Invoices	Can create invoices. Can edit WisDOT-created invoices. Cannot review, adjust, reject or approve invoices.
Invoice Reviewer	View Contracts View Invoices Invoice Auditor	Can review invoices. Cannot adjust, reject or approve invoices.
Notify Primary	Email Primary	Future Use. Designated users receive email notification when invoices and evaluations are sent by consultants. If invoices and evaluations that are not acted upon within 10 days, a second email is generated.
Notify Secondary	Email Secondary	Future Use. Designated users receive email notification if invoices and evaluations are not acted upon within 20 days. This role is generally assigned to supervisors.
View Evaluations	View Evaluations	Can view evaluations for assigned contracts. Cannot create, edit or change the status of evaluations. Cannot view evaluations that are in "Ready for Review" status
View Invoices	View Contracts View Invoices	Can view invoices for assigned contracts. Cannot create, adjust, reject, approve or change the status of invoices. Cannot view vendor-created invoices in "Draft" status.



View Contracts	View Contracts	Can view all contracts. This role allows the user to view contracts only. No access to invoices or evaluations is granted. WisDOT users are automatically assigned the View Contracts role when they are added as WisDOT users by Regional Administrators or CARS Administrators.
----------------	----------------	--

Regional Administrators are responsible for maintaining WisDOT user access for WisDOT as a whole, not just for their own regions or bureaus. The table below describes common events and the Regional Administrator’s responsibilities for each event.

Note: If the user changes affect 25 or more projects, please contact the CARS Administrator (WisDOTCARS@dot.wi.gov) because it may be time consuming to move or remove access for large numbers of projects. The CARS Administrator may be able to assign roles using database updates.

<u>Event</u>	<u>Action</u>
New project is approved	<ul style="list-style-type: none"> • Assign user access for the new project
Project is cancelled	<ul style="list-style-type: none"> • Remove user access from this project
User changes roles Example: Project Manager becomes a supervisor	<ul style="list-style-type: none"> • Identify impacted projects to be revised • Adjust roles accordingly
User changes region	<u>Old Regional Administrator:</u> <ul style="list-style-type: none"> • Remove user access for all projects or as directed
	<u>New Regional Administrator:</u> <ul style="list-style-type: none"> • Assign user access for all projects or as directed
User leaves DOT	<ul style="list-style-type: none"> • Notify the CARS Administrator (WisDOTCARS@dot.wi.gov) to get the user removed from CARS completely. Provide the effective date. • Remove user access from all contracts



WisDOT: Assign WisDOT Roles

The *DOT Staff Security List* page lists WisDOT users with their assigned roles and lists of contracts.

There are two columns in this list: **Roles - Actions** and **Contracts**.

Note: DOT Administrators are not listed in the *DOT Staff Security List* for Regional Administrators. Please contact the CARS Administrator (WisDOTCARS@dot.wi.gov) if the WAMS ID you need is not listed.

Regional Administrators can add roles for specific contracts, which are listed in the **Contracts** column. Only DOT Administrators can add or change DOT Staff roles, which are listed in the **Roles-Actions** column.

Locate a WisDOT User

- Path: **Security** → **Security List-DOT**

CARS opens the *DOT Staff Security List* page.

To locate the WisDOT user by WAMS ID in the **DOT Staff Security List**:

1. Click the letter of the user's last name in the **Filter Staff** section.

The screenshot shows the "DOT Staff Security List" page. At the top right is a "Print Page" button. Below it is a "Filter Staff" section with a dropdown menu showing letters A through Z. A red box labeled '1' highlights the letter 'A'. Below the filter is a table titled "DOT Staff Security List" with a "Add DOT Staff Member" button. The table has three columns: "DOT Staff Member", "Roles - Actions", and "Contracts". The table is currently empty, with the message "Nothing found to display." and "No items found. 1" below it.

The screenshot shows the "DOT Staff Security List" page with a table of users. The table has three columns: "DOT Staff Member", "Roles - Actions", and "Contracts". The table contains three rows of user information. A red box labeled 'c' highlights the "Add DOT Staff Member" button. A modal window titled "Add DOT Staff Member" is open, showing a "WAMS ID:" field and "Save" and "Cancel" buttons. A red box labeled 'a' highlights the letter 'a' in the "Filter Staff" dropdown menu.

DOT Staff Member	Roles - Actions	Contracts
COLEW - Cole Wood Email: colewood9@gmail.com	View Contracts - View Contracts	
SWOOD - Sara Wood Email: sarawood784@yahoo.com	Dot Regional Admin - Email Primary, Email Secondary, Manage DOT Staff View Contracts - View Contracts	
JWORD - Jack Word Email: jackword@inbox.com	Dot Regional Admin - Email Primary, Email Secondary, Manage DOT Staff View Contracts - View Contracts	



WisDOT: Assign WisDOT Roles - continued

2. Locate or add the user by WAMS ID. You can:
 - a. Read the pages to find the user and click the user name link.
 - b. Sort the list by DOT Staff Member by clicking the column heading link, locate the user, and click the user name link.
 - c. If the user is not in the list, click **Add DOT Staff Member** and search by WAMS ID. Then click **Save**. CARS automatically adds the View Contracts role to new WisDOT users. CARS opens the *View DOT Staff Member* page for that user.

The screenshot shows the 'DOT Staff Security List' interface. At the top, there is a 'Filter Staff' section with an alphabetical navigation bar (A-Z) and a search input field. Below this is a table titled 'DOT Staff Security List' with a table header containing 'DOT Staff Member', 'Roles - Actions', and 'Contracts'. The table body is empty, displaying 'No items found. 1'.



This screenshot shows the 'DOT Staff Security List' page with an 'Add DOT Staff Member' modal window open. The modal has a title 'Add DOT Staff Member' and a 'WAMS ID:' input field. The background table is visible, showing three staff members: Cole Wood, Sara Wood, and Jack Word. The 'DOT Staff Member' column header is highlighted with a red 'b', and the 'Add DOT Staff Member' button is highlighted with a red 'c'. A red 'a' is also present near the pagination controls.

DOT Staff Member	Roles - Actions	Contracts
COLEW - Cole Wood Email: colewood9@gmail.com	View Contracts - View Contracts	
SWOOD - Sara Wood Email: sarawood784@yahoo.com	Dot Regional Admin - Email Primary, Email Secondary, Manage DOT Staff View Contracts - View Contracts	
JWORD - Jack Word Email: jackword@inbox.com	Dot Regional Admin - Email Primary, Email Secondary, Manage DOT Staff View Contracts - View Contracts	



Add Contract Roles for a WisDOT User

To complete this process, locate the WisDOT user as described on page 158 and begin on the *View DOT Staff Member* page.

1. In the **Contracts** section, click **Assign Contract / Roles**. CARS opens the *Manage Contracts* page for the user.
2. On the *Manage Contracts* page, create a list of individual contracts that will be assigned the same group of permissions. If this user needs different permissions for one or more contracts, you must assign them separately. To create a list of contracts:
 - a. Select a specific contract in the **Contracts** field.
 - b. Click **Add Contract**  to include a specific contract in the list of contracts. CARS lists the contracts you select under the **Contracts** field.
 - c. Click **Delete**  to remove a specific contract from the list.

Note: You must select and add each contract to the list individually. You cannot select more than one contract at a time.

View DOT Staff Member

View Staff

DOT Staff Member: COLEW - Cole Wood
Email: colewood9@gmail.com


▼ Roles on DOT Staff:

One item found. 1

Roles	Actions
View Contracts	View Contracts

▼ Contracts

Nothing found to display.


1  Assign Contract / Roles

Manage Contracts

* Indicates required field

Manage Contracts

Staff Member: Cole Wood

a Contracts *
-Select-  **b**

2

- 0072-04-40 : 728070072 : 10/17/2007
- 0072-04-75 : M06955136 : 10 : 1219115136 : 07/30/2014 **c**

Roles: *

Check	Roles#	Actions#
<input checked="" type="checkbox"/>	Evaluation Editor	View Contracts, View Evaluations, Manage Evaluations
<input type="checkbox"/>	Invoice Approver	View Contracts, View Invoices, Manage Invoices, Invoice Approver
<input type="checkbox"/>	Invoice Editor	View Contracts, View Invoices, Manage Invoices
<input type="checkbox"/>	Invoice Reviewer	View Contracts, View Invoices, Invoice Auditor
<input type="checkbox"/>	Notify Primary	Email Primary
<input checked="" type="checkbox"/>	Notify Secondary	Email Secondary
<input type="checkbox"/>	View Evaluations	View Evaluation
<input type="checkbox"/>	View Invoices	View Contracts, View Invoices

4 **Save** **Cancel**



Add Contract Roles for a WisDOT User
continued

3. In the **Roles** table, select the roles this user needs for the listed contracts. You must select at least one role.
4. Click **Save**. The user now has the assigned roles for the specific contracts you chose. CARS lists each contract separately on the *View DOT Staff Member* page.

Manage Contracts
* Indicates required field

Manage Contracts
Staff Member: Cole Wood

a Contracts *
-Select- **b**

2 • 0072-04-40 : 728070072 : 10/17/2007
• 0072-04-75 : M06955136 : 10 : 1219115136 : 07/30/2014 **c**

Roles: *


Check	Roles#	Actions#
<input checked="" type="checkbox"/>	Evaluation Editor	View Contracts, View Evaluations, Manage Evaluations
<input type="checkbox"/>	Invoice Approver	View Contracts, View Invoices, Manage Invoices, Invoice Approver
<input type="checkbox"/>	Invoice Editor	View Contracts, View Invoices, Manage Invoices
<input type="checkbox"/>	Invoice Reviewer	View Contracts, View Invoices, Invoice Auditor
<input type="checkbox"/>	Notify Primary	Email Primary
<input checked="" type="checkbox"/>	Notify Secondary	Email Secondary
<input type="checkbox"/>	View Evaluations	View Evaluation
<input type="checkbox"/>	View Invoices	View Contracts, View Invoices

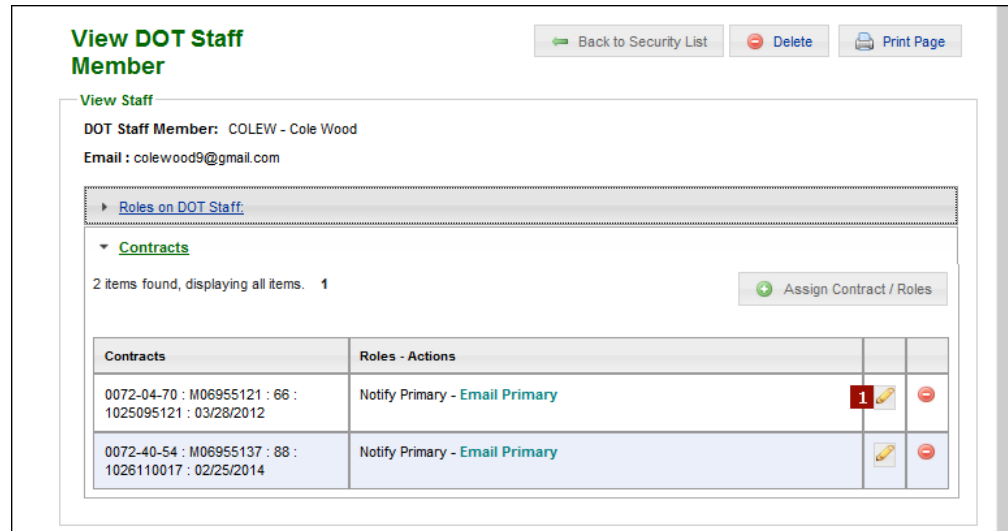
4 Save Cancel



Edit Contract Roles for a WisDOT User

To complete this process, locate the WisDOT user as described on page 158 and begin on the *View DOT Staff Member* page.

1. In the **Contracts** section, locate the appropriate contract and click **Edit Contract Roles**.  CARS opens the *Manage Contracts* page.
2. In the **Roles** table, select the roles this user needs for the contract. You must select at least one role.
3. Click **Save**. The user now has the new permissions you have assigned.



View DOT Staff Member

Back to Security List Delete Print Page





View Staff

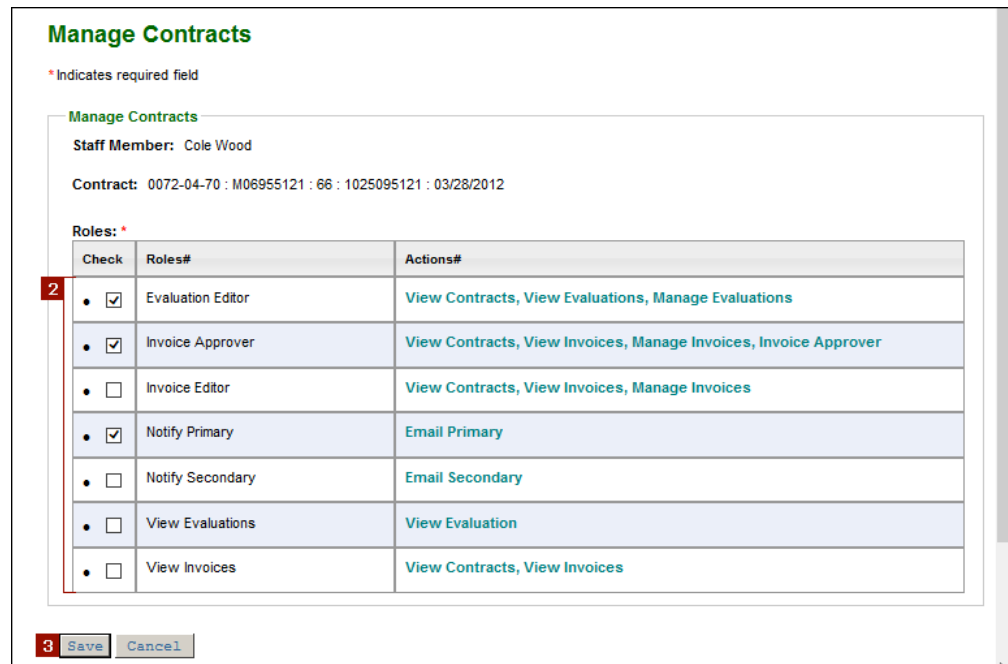
DOT Staff Member: COLEW - Cole Wood
Email: colewood9@gmail.com

Roles on DOT Staff

Contracts

2 items found, displaying all items. 1 Assign Contract / Roles

Contracts	Roles - Actions		
0072-04-70 : M06955121 : 66 : 1025095121 : 03/28/2012	Notify Primary - Email Primary		
0072-40-54 : M06955137 : 88 : 1026110017 : 02/25/2014	Notify Primary - Email Primary		



Manage Contracts

* Indicates required field

Manage Contracts

Staff Member: Cole Wood

Contract: 0072-04-70 : M06955121 : 66 : 1025095121 : 03/28/2012

Roles: *


Check	Roles#	Actions#
<input checked="" type="checkbox"/>	Evaluation Editor	View Contracts, View Evaluations, Manage Evaluations
<input checked="" type="checkbox"/>	Invoice Approver	View Contracts, View Invoices, Manage Invoices, Invoice Approver
<input type="checkbox"/>	Invoice Editor	View Contracts, View Invoices, Manage Invoices
<input checked="" type="checkbox"/>	Notify Primary	Email Primary
<input type="checkbox"/>	Notify Secondary	Email Secondary
<input type="checkbox"/>	View Evaluations	View Evaluation
<input type="checkbox"/>	View Invoices	View Contracts, View Invoices

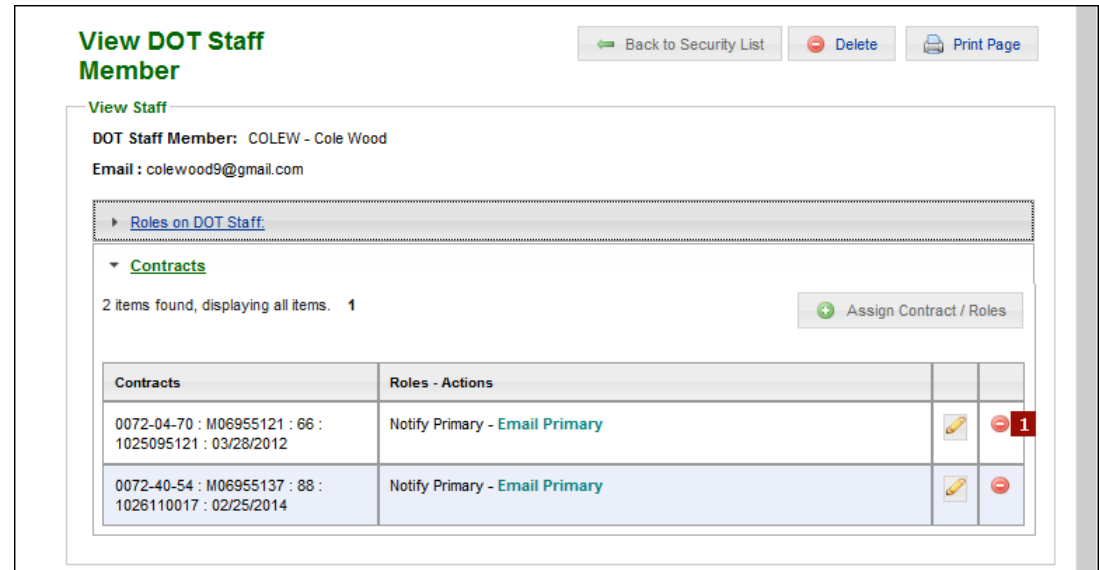
Save Cancel







Delete Contract Roles for a WisDOT User

To complete this process, locate the WisDOT user as described on page 158 and begin on the *View DOT Staff Member* page.

1. In the **Contracts** section, locate the appropriate contract group and click **Delete Contract** . CARS displays the message, “Are you sure you want to DELETE Contract from staff member?”
2. Click **Confirm**. CARS removes all permissions for the contract and deletes the contract from the user’s contracts list.



The screenshot shows the 'View DOT Staff Member' page for Cole Wood. The page includes navigation buttons for 'Back to Security List', 'Delete', and 'Print Page'. Under the 'View Staff' section, the user's name and email are listed. A 'Roles on DOT Staff' section is expanded to show 'Contracts'. A table lists two contracts with their respective roles and actions. A red '1' is placed over the delete icon for the first contract.

Contracts	Roles - Actions		
0072-04-70 : M06955121 : 66 : 1025095121 : 03/28/2012	Notify Primary - Email Primary		 1
0072-40-54 : M06955137 : 88 : 1026110017 : 02/25/2014	Notify Primary - Email Primary		



The dialog box contains the text: "Are you sure you want to DELETE Contract from staff member?". At the bottom, there are two buttons: "Confirm" (with a red '2' next to it) and "Cancel".



APPENDIX 6 Vendor Administrator Instructions

Consultants: Security Menu

CARS Vendor Administrators grant roles either for individual contracts or by **groups** that combine a specific set of contracts. A security group is a set of contracts with specific roles applied to those contracts. Each person assigned to the group has the same access.

Note: Security administrators must maintain the contract role assignments for their firms. If your firm has a new contract or amendment, none of your users can access it until you update the security access.

Security settings are configured by persons who have the *Vendor Administrator* role in CARS. Each firm should have two or more persons who are assigned this role. The **Security** menu is visible only to persons who have the *Vendor Administrator* role in CARS. The **Security** menu has two commands: **Security List** and **Manage Groups**.

The commands on the security menu allow detailed control of the access each staff member has to the firm's contract information. The functions accessed from each command are described in Table 2.

Table 2: Security Menu Commands

Command	Functions
Security List	Add staff members to your firm's <i>Vendor Security List</i> Delete staff members from your firm's <i>Vendor Security List</i> Access the <i>View Staff Member</i> page for each staff member, where you can review and manage detailed security settings for each staff member: Assign and un-assign security roles such as <i>Vendor Staff</i> and <i>Vendor Administrator</i> Assign and un-assign prime contract, subcontract, and amendment roles Assign and un-assign groups
Manage Groups	Create groups of contracts, subcontracts, or amendments Manage groups Delete groups



Consultants: Access the Security List

- Open the *Vendor Security List* page:
 - Path: **Security**→ **Security List**
CARS opens the *Vendor Security List* page.

Note: The **Security** menu is visible only to persons who have the *Vendor Administrator* role in CARS.

Vendor Security List Print Page

Security List

Vendor Name: Osage

Administrators :

- JOHNKANE - John Kane

Add Staff Member

Staff Members

One item found. 1

Staff Member	Roles - Actions	Groups	Contracts
JOHNKANE - John Kane Email: kane.john68@yahoo.com	Vendor Administrator - Manage Staff Assignments Vendor Staff - Vendor Access		



Consultants: Add Staff Members


1. On the *Vendor Security List* page, click **Add Staff Member**. CARS opens the *Add Staff Member* page.
2. Enter the staff member's WAMS ID in the **WAMS ID** field.
3. Click **Save**.


CARS automatically opens the *View Staff Member* page so you can start adding roles. At this point, the new staff member's dashboard will list all of your firm's prime contracts, subcontracts, amendments, invoices and evaluations. However, none of these items will have active links, and the staff member will have no access to anything except to view the list on the dashboard.

Note: The CARS Administrator cannot assign any vendor roles for a consultant user except Vendor Staff and Vendor Administrator on this page. Any access beyond these two roles is assigned as described in *Consultants: Assign Security Roles* on page 167.

The person who assigns contract roles must have the Vendor Administrator role for the consultant firm.

Consultants: Delete Staff Members

1. On the *Vendor Security List* page, click **Delete Staff**  in the table row of the staff member you want to delete. CARS displays a message asking you to confirm the deletion.
2. Click **Confirm**.
CARS removes the **Staff Member** from your **Staff Members** table.

Staff Member	Roles - Actions	Groups	Contracts
JOHNKANE - John Kane Email: kane.john68@yahoo.com	Vendor Administrator - Manage Staff Assignments Vendor Staff - Vendor Access		
MARKZANE - Mark Zane Email: markzane384@yahoo.com	Vendor Staff - Vendor Access		



Consultants: Assign Security Roles

CARS automatically assigns the Vendor Staff role to all consultant users when they are added as staff members to the consultant firm as described on page 166. This role is required for access to CARS, but provides no access to project, contract, evaluation or invoice records.

Note: The only security role not associated with records that you can assign or un-assign using this process is *Vendor Administrator*.

1. On the *Vendor Security List* page, click the user name of the staff member whose role you are changing. The name serves as a link to the *View Staff Member* page, which provides detailed information about the person's security access to this firm's records.
2. Click **Add Role**.
3. On the *Manage Staff Member* page, select the **Vendor Administrator** box for this staff member in the **Check** column.
4. Click **Save**.

Note: The **Add Role** button does not appear when the staff member already has both the *Vendor Staff* and *Vendor Administrator* roles.

Consultants: Un-Assign Security Roles

Follow the procedure for assigning security roles, except de-select the *Vendor Administrator* role for this staff member.

[← Back to Security List](#)
[Delete](#)
[Print Page](#)

View Staff Member

View Staff

Vendor Name: Osage
 Staff Member: KPOST - Ken Post
 Email : kenpost90@yahoo.com

▼ **Roles on Vendor:**
 One item found. 1 2 [Add Role](#)

Roles	Actions
Vendor Staff	Vendor Access

▶ [Prime Contracts](#)

▼ **SubContracts**
 Nothing found to display. [Assign SubContract / Roles](#)

Manage Staff Member

Roles

Vendor Name: Osage
 Staff Member: Ken Post

Roles:

Check	Roles#	Actions#
3 <input type="checkbox"/>	Vendor Administrator	Manage Staff Assignments
<input checked="" type="checkbox"/>	Vendor Staff	Vendor Access

4 [Save](#) [Cancel](#)



Consultants: Assign Contract Roles

This process grants access to one or more individual contracts. Remember that prime contracts, subcontracts and amendments are handled separately. The process of assigning roles is the same for each type of contract.

1. On the *Vendor Security List* page, click the staff member name link in the *Staff Members* table. CARS opens the *View Staff Member* page.

2. Click **Assign Contract / Roles**

- OR -

Assign SubContract / Roles

- OR -

Assign Amendment SubContract / Roles.

WISCONSIN DEPARTMENT OF TRANSPORTATION
Doing Business ACPT
Home Search Security Log Off
CARS - Contract Administration & Reporting System
JOHNKANE - John Kane processing on behalf of Osage Project, Contract or Master Contract: Search

View Staff Member Back to Security List Delete Print Page

View Staff

Vendor Name: Osage
Staff Member: MARKZANE - Mark Zane
Email : markzane384@yahoo.com

▶ [Roles on Vendor:](#)

▼ [Prime Contracts](#)
Nothing found to display. Assign Contract / Roles



▼ [SubContracts](#)
Nothing found to display. Assign SubContract / Roles

▼ [Amendment SubContracts](#)
Nothing found to display. Assign Amendment SubContract / Roles

▶ [Groups](#)



Consultants: Assign Contract Roles - continued

3. Create a list of individual contracts:
 - a. Select a specific contract in the **Contracts** field.
 - b. Click **Add Contract**  to include a specific contract in the list of contracts. CARS lists the contracts you select under the **Contracts** field.
 - c. Click **Delete**  to remove a specific contract from the list.

Note: You must select and add each contract or subcontract to the list individually. You cannot select more than one contract at a time.

- OR -

4. Select **Select All Active Contracts** to grant this staff member access to every existing active contract assigned to this firm (vendor).

Note: You must maintain user access by adding and removing contracts as they come in or finish. Selecting this checkbox assigns roles only for currently active contracts.

5. In the **Roles** table, select the roles this staff member needs for the specified contracts. You must select at least one role.
6. Click **Save**. The staff member now has the assigned roles for the specific contracts you chose.

Edit/New SubContract

* Indicates required field



Manage SubContracts



Vendor Name: Amos Enterprises

Staff Member: Greg Fox

Note: Selecting "All Active Contracts" will assign below selected roles in all active contracts to this staff member.

4 **Select All Active Contracts**

a **SubContracts ***  

3 • 1900-05-04 : 1400016267 : 03/01/2016  


Roles:

Check	Roles#	Actions#
5 <input type="checkbox"/>	Invoice Notification	Invoice Notification
<input type="checkbox"/>	SubContract Invoice Editor	Manage SubContract Invoice
<input type="checkbox"/>	Subcontractor Invoice Submitter	Manage Subcontract Invoice, Subcontract Invoice Submitter
<input type="checkbox"/>	SubContract Evaluation Reviewer	View SubContract Evaluations, SubContract Evaluation Reviewer
<input type="checkbox"/>	View SubContract Evaluations	View SubContracts, View SubContract Evaluations
<input type="checkbox"/>	View SubContract Invoice	View SubContracts, View SubContract Invoice
<input type="checkbox"/>	View SubContracts	View SubContracts

6



Consultants: Edit Contract Roles

1. On the *Vendor Security List* page, click the staff member name link in the *Staff Members* table. CARS opens the *View Staff Member* page.
2. Click **Edit Contract Roles**  in the table row of the contract for which you want to change access. CARS opens the *Edit/New Contract* page.
3. Change the contract access by:


- Changing the role name
- Selecting or de-selecting roles in the **Roles** table

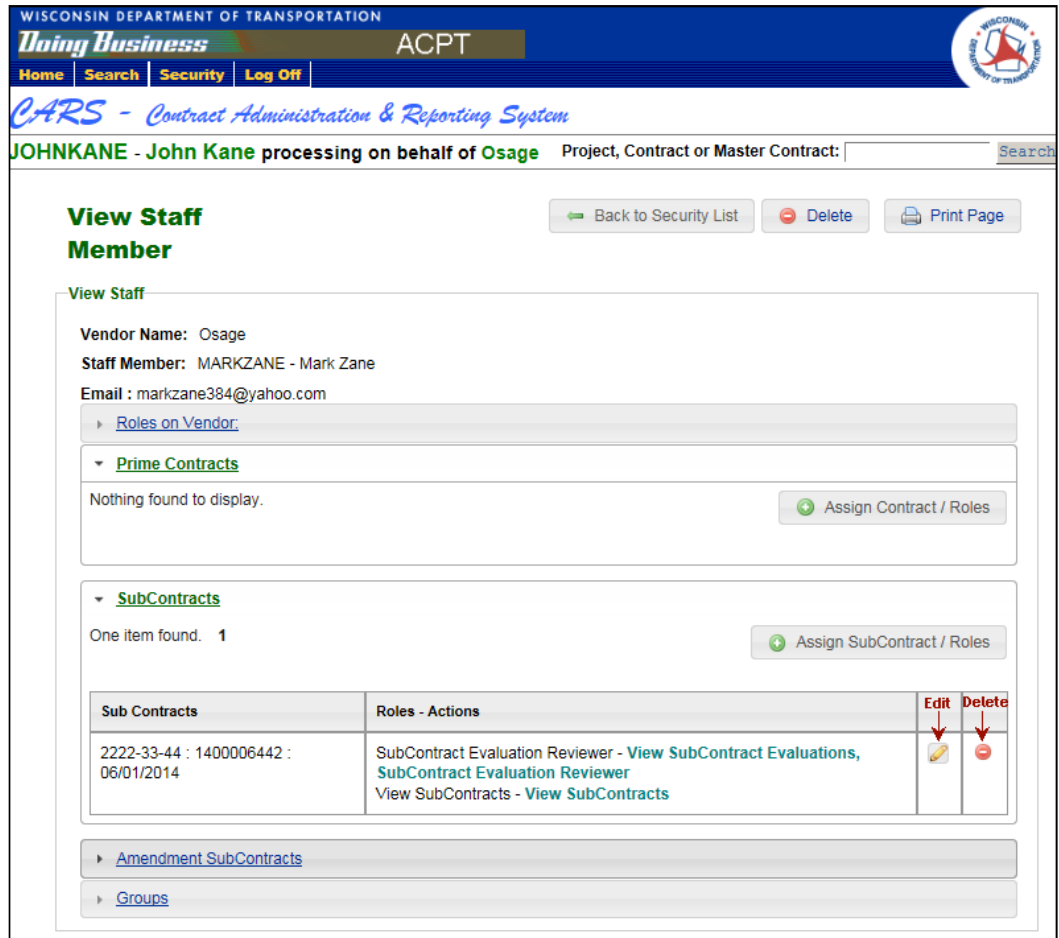
- OR -

- Adding or removing contracts

4. Click **Save**.
CARS changes the staff member's access to the contract and returns to the *View Staff Member* page, which now shows the updated roles.

Consultants: Delete Contract from Staff Member

1. On the *Vendor Security List* page, click the staff member name link in the *Staff Members* table. CARS opens the *View Staff Member* page.
2. Click **Delete Contract**  in the table row of the contract for which you want to remove access. CARS displays a message asking you to confirm the deletion.
3. Click **Confirm**. CARS removes the contract from the staff member's **Contracts** table. The roles are automatically deleted when the contract deletion is confirmed.



WISCONSIN DEPARTMENT OF TRANSPORTATION
Doing Business ACPT
 Home Search Security Log Off
 CARS - Contract Administration & Reporting System
 JOHNKANE - John Kane processing on behalf of Osage Project, Contract or Master Contract: Search

View Staff Member Back to Security List Delete Print Page



View Staff

Vendor Name: Osage
 Staff Member: MARKZANE - Mark Zane
 Email : markzane384@yahoo.com

▶ [Roles on Vendor:](#)

▼ [Prime Contracts](#)
 Nothing found to display. Assign Contract / Roles

▼ [SubContracts](#)
 One item found. 1 Assign SubContract / Roles

Sub Contracts	Roles - Actions	Edit	Delete
2222-33-44 : 1400006442 : 06/01/2014	SubContract Evaluation Reviewer - View SubContract Evaluations , SubContract Evaluation Reviewer View SubContracts - View SubContracts		

▶ [Amendment SubContracts](#)

▶ [Groups](#)



Assign Roles for All Parts of the Contract

Staff members who create invoices in CARS must have security access to all subcontracts, amendment subcontracts and phases that apply to their firms in order for the invoice costs to be applied correctly. Contracts with multiple amendments are listed once for each amendment awarded to your firm. Phased projects are listed once for each phase; the project IDs are the same, but the contract number and approval dates vary.

<p>Manage Amendment SubContracts</p> <p>Staff Member: <input type="text"/></p> <p>Note: Selecting "All Active Contracts" will assign below selected roles in all active contracts to this staff member.</p> <p>Select All Active Contracts <input type="checkbox"/></p> <p>Amendment SubContracts *</p> <table border="1"><tr><td>-Select-</td><td></td><td></td><td></td><td></td></tr><tr><td>0000-00-11</td><td>: 1400016329</td><td>: 11/01/2015</td><td>: 2</td><td></td></tr><tr><td>0000-00-11</td><td>: 1400016329</td><td>: 11/01/2015</td><td>: 3</td><td></td></tr><tr><td>0000-00-11</td><td>: 1400016329</td><td>: 11/01/2015</td><td>: 4</td><td></td></tr></table>	-Select-					0000-00-11	: 1400016329	: 11/01/2015	: 2		0000-00-11	: 1400016329	: 11/01/2015	: 3		0000-00-11	: 1400016329	: 11/01/2015	: 4		<p>Manage Contracts</p> <p>Staff Member: <input type="text"/></p> <p>Status * <input type="text" value="Active"/> <input type="button" value="Filter"/></p> <p>Contracts *</p> <table border="1"><tr><td>1005-01-01</td><td>: 1123111001</td><td>: 12/01/2011</td><td></td></tr><tr><td>1005-01-01</td><td>: 1400010600</td><td>: 01/11/2013</td><td></td></tr><tr><td>1005-01-01</td><td>: 1400110843</td><td>: 02/01/2015</td><td></td></tr></table>	1005-01-01	: 1123111001	: 12/01/2011		1005-01-01	: 1400010600	: 01/11/2013		1005-01-01	: 1400110843	: 02/01/2015	
-Select-																																	
0000-00-11	: 1400016329	: 11/01/2015	: 2																														
0000-00-11	: 1400016329	: 11/01/2015	: 3																														
0000-00-11	: 1400016329	: 11/01/2015	: 4																														
1005-01-01	: 1123111001	: 12/01/2011																															
1005-01-01	: 1400010600	: 01/11/2013																															
1005-01-01	: 1400110843	: 02/01/2015																															

Three Amendment Subcontracts

Three Phases for a Project

Consultants: Manage Groups

Groups are used to stream line staff access assignments. CARS allows you to group prime contracts or sub contracts or amendments and assign roles that apply to every contract in the group. When you assign a staff member to a group, you grant the staff member the specified roles for each contract in the group. Only staff members who have the Vendor Administrator role can create and manage groups.

- Groups must contain like objects. Because prime contracts, subcontracts and amendments are not managed alike in CARS, groups must contain only one type of contract.
- Access to prime contracts, subcontracts and amendments can be assigned either through groups or through individual contracts. Neither access method supersedes the other.
- Access granted by roles and groups is cumulative. You can increase a staff member's access for an individual contract, even if the staff member has access to it as a member of a group.
- You can add prime contracts, subcontracts and amendments to more than one group, provided the same type of contract is included in the group.

Plan your firm's groups carefully. Try to give each group a meaningful name so it is clear what access the group allows. Consider setting naming convention standards or policy.



Maintain your firm's groups. Periodically remove completed contracts or add them to a special group. Be sure to add new contracts to appropriate groups. You can use individual contract roles to grant additional access to a contract if a staff member needs more roles than are built into the group.

Group names must be unique within a firm. Each group name cannot be longer than 37 characters. If the name you choose is longer than 37 characters, CARS will stop allowing character entry.



Consultants: Create a New Contract Group

1. Open the *Manage Groups* page:
 - Path: **Security**→ **Manage Groups**
2. Click **Add Group**.
CARS opens the *Group type selection* dialog box.
3. Choose the appropriate group type based on the type of contracts in the group
4. Click **OK**. CARS opens the **New/Edit Group** page.
5. Enter a name for the group in the **Group Name** field.
6. Select roles for the group in the **Roles** table.
7. Create a list of individual contracts:

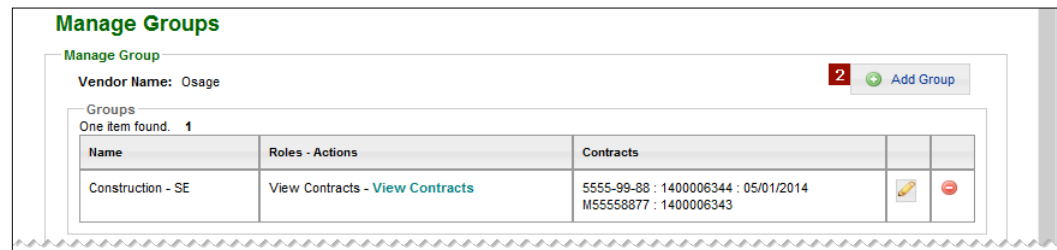
- a. Select a specific contract in the **Contracts** field.
- b. Click **Add Contract**  to include a specific contract in the group to which you are granting access.
- c. Click **Delete**  to remove a specific contract from the group.

- OR -

8. Select **Select All Contracts** to add every existing contract assigned to this consultant firm to this group.

Note: You must maintain your groups by adding and removing contracts as they come in or finish, or by adding new groups for new contracts.



9. Click **Save**.
CARS creates the new group and lists it on the *Manage Groups* page.

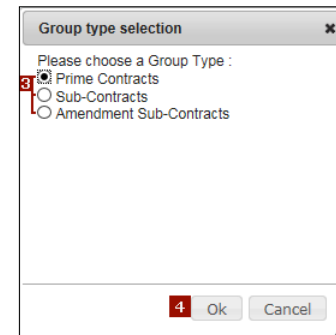


Manage Groups

Vendor Name: Osage 2  Add Group

Groups
One item found. 1

Name	Roles - Actions	Contracts		
Construction - SE	View Contracts - View Contracts	5555-99-88 : 1400006344 : 05/01/2014 M55558877 : 1400006343		

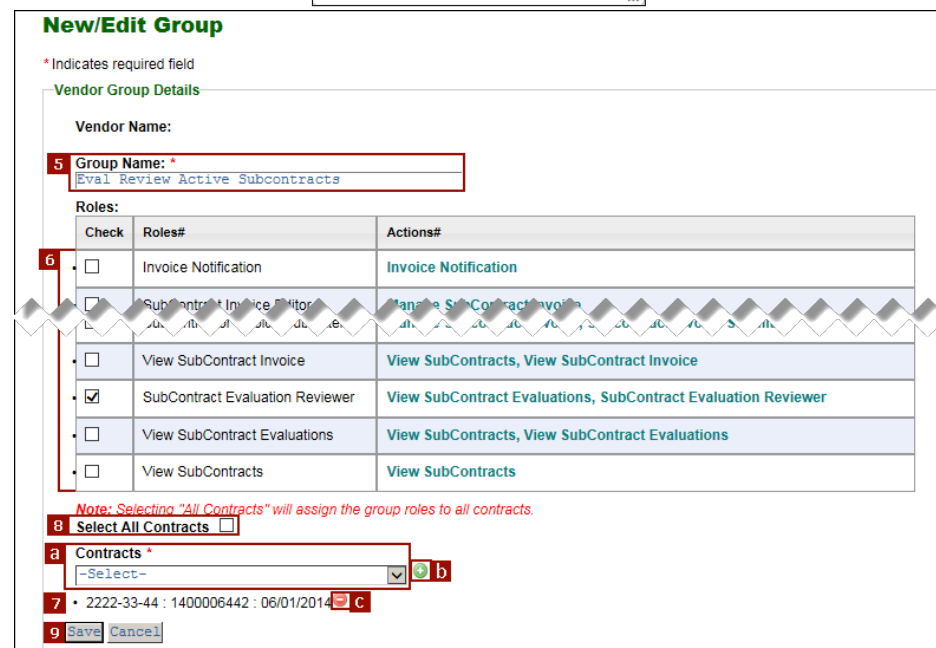


Group type selection

Please choose a Group Type :

3 Prime Contracts
 Sub-Contracts
 Amendment Sub-Contracts

4



New/Edit Group

* Indicates required field

Vendor Group Details

Vendor Name:


5 **Group Name:** *
Eval Review Active Subcontracts


Roles:

Check	Roles#	Actions#
6 <input type="checkbox"/>	Invoice Notification	Invoice Notification
<input type="checkbox"/>	SubContract Invoice Monitor	Manage SubContract Invoice
<input type="checkbox"/>	View SubContract Invoice	View SubContracts, View SubContract Invoice
<input checked="" type="checkbox"/>	SubContract Evaluation Reviewer	View SubContract Evaluations, SubContract Evaluation Reviewer
<input type="checkbox"/>	View SubContract Evaluations	View SubContracts, View SubContract Evaluations
<input type="checkbox"/>	View SubContracts	View SubContracts

Note: Selecting "All Contracts" will assign the group roles to all contracts.

8 Select All Contracts

a **Contracts** *
-Select- b 

7 • 2222-33-44 : 1400006442 : 06/01/2014 c 

9



Consultants: Assign Staff Members to Contract Groups

1. Open the *Vendor Security List* page:
 - Path: **Security**→ **Security List**
2. Click the staff member name link in the *Staff Members* table to open the *View Staff Member* page.
3. Click **Assign/Unassign Groups**.
CARS opens the *Assign/Unassign Groups* page.
4. Select the groups for the staff member.
5. Click **Save**.
CARS adds the staff member to the group and lists the groups and details on the *View Staff Member* page and the *Vendor Security List* page.

Vendor Security List

Security List

Vendor Name: Osage

Administrators :

- MARKZANE - Mark Zane
- JOHNKANE - John Kane

[Add Staff Member](#)

Staff Members
2 items found, displaying all items. 1

Staff Member	Roles - Actions	Groups	Contracts
MARKZANE - Mark Zane Email: markzane384@yahoo.com	Vendor Staff - Vendor Access Vendor Administrator - Manage Staff Assignments		2222-33-44 : 1400006442 : 06/01/2014 : 2

View Staff Member

View Staff

Vendor Name: Osage

Staff Member: MARKZANE - Mark Zane

Email : markzane384@yahoo.com

[Roles on Vendor](#)

[Print Contracts](#)

[Assign/UnAssign Groups](#)

Groups

Nothing found to display.

[Assign/UnAssign Groups](#)

Assign/UnAssign Groups

Groups

Vendor Name: Osage

Staff Member: MARKZANE - Mark Zane

Email : markzane384@yahoo.com


Groups:

Check	Name	Roles - Actions	Contracts
<input checked="" type="checkbox"/>	Construction - SE	View Contracts - View Contracts	5555-99-88 : 1400006344 : 05/01/2014 M55558877 : 1400006343

[Save](#) [Cancel](#)



Consultants: Modify Contract Group Roles

1. Open the *Manage Groups* page:
 - Path: **Security**→ **Manage Groups**
2. Click **Edit Group**  for the appropriate group.
CARS opens the *New/Edit Group* page.
3. Select roles you want to add, or de-select roles you want to remove.
4. Click **Save**.
CARS modifies the group and lists the new information on the *Manage Group* page.

Manage Groups

Manage Group Add Group

Vendor Name: Osage

Groups
One item found. 1

Name	Roles - Actions	Contracts
Construction - SE	View Contracts - View Contracts	5555-99-88 : 1400006344 : 05/01/2014 M55558877 : 1400006343

New/Edit Group

* Indicates required field

Vendor Group Details

Vendor Name: Osage

Group Name: *

Roles:

Check	Roles#	Actions#
<input type="checkbox"/>	Evaluation Notification	Evaluation Notification.
<input checked="" type="checkbox"/>	Evaluation Reviewer	View Evaluations, Evaluation Reviewer
<input type="checkbox"/>	Invoice Editor	View Invoices, Manage Invoice
<input type="checkbox"/>	Invoice Notification	Invoice Notification
<input type="checkbox"/>	Invoice Submitter	View Contracts, View Invoices, Manage Invoice, Invoice Submitter
<input checked="" type="checkbox"/>	View Contracts	View Contracts
<input type="checkbox"/>	View Evaluations	View Contracts, View Evaluations
<input type="checkbox"/>	View Invoices	View Contracts, View Invoices

Note: Selecting "All Contracts" will assign the group roles to all contracts.

Select All Contracts

Contracts *
 +

- 7777-88-99 : 1400006423 -
- 7777-11-22 : 1400006424 : 05/01/2014 -

4

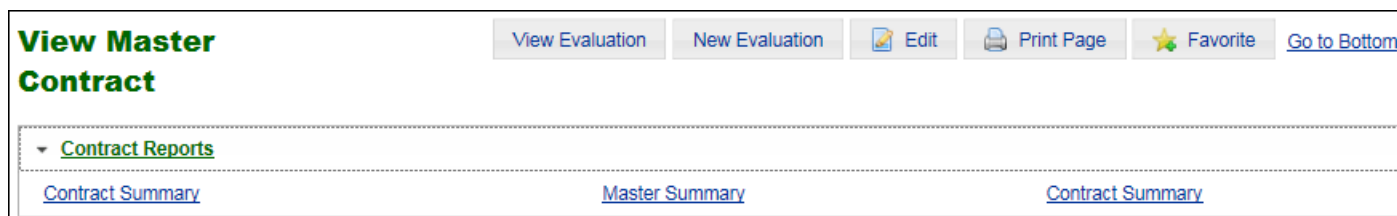


APPENDIX 7 Reports

There are 37 CARS reports currently available in SAP® BusinessObjects™. The reports are available to WisDOT users. Users who need access to these reports must provide their WisDOT Active Directory (network or LAN) login to the [CARS Administrator](#) (WisDOTCARS@dot.wi.gov).



You can access reports using the **Reports** button on the main menu to access reports. Path: Reports → BO Reports



Two reports are accessed from CARS pages. The *Contract Summary Cost Line Report* can be accessed directly from the *View Contract*, *View Master Contract* and *View Work Order* pages via the **Contract Summary** links. Expand the Contract Reports section at the top of the page and click **Contract Summary**.

Note: Both *Contract Summary* links open the same report.

The **Master Summary** link opens the report *Current Master Contracts Balances and Contacts, Totals by Contract*, which is available only on the *View Master Contract* and *View Work Order* pages.

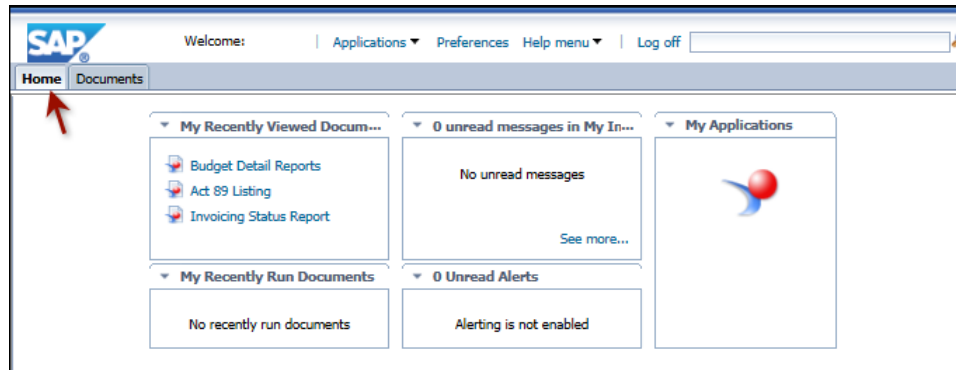
Both report links open a new Internet Explorer window and run the report automatically using parameters from the currently open contract record.



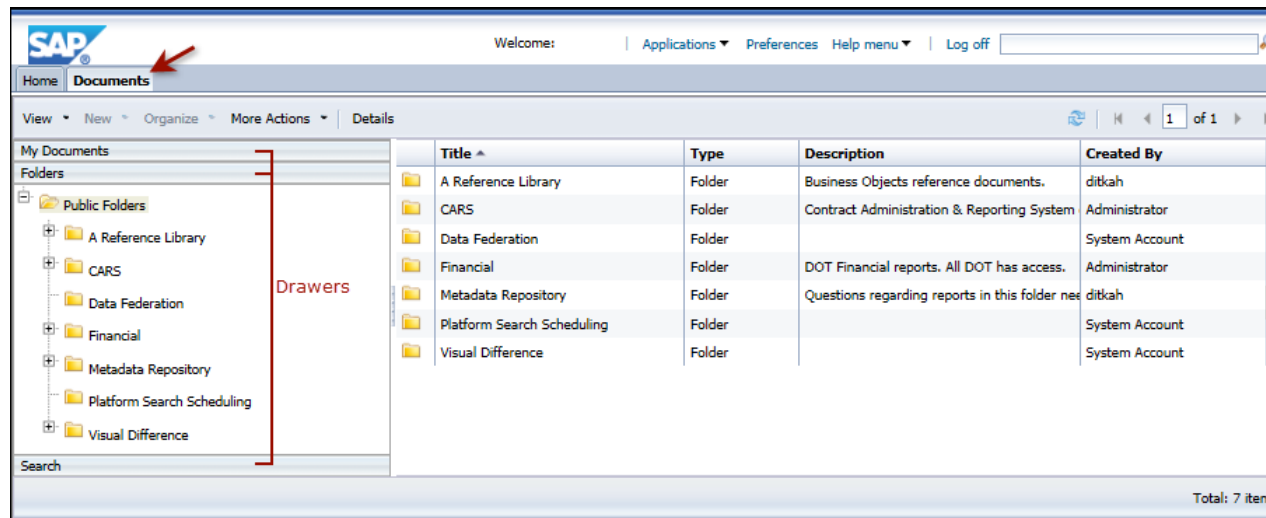
Report Window Controls

Main Tabs

There are two main tabs in SAP BusinessObjects. When you run a report, SAP BusinessObjects creates another tab for the report.



- The **Home** tab shows a list of documents you have most recently viewed or run, and lists messages and alerts.



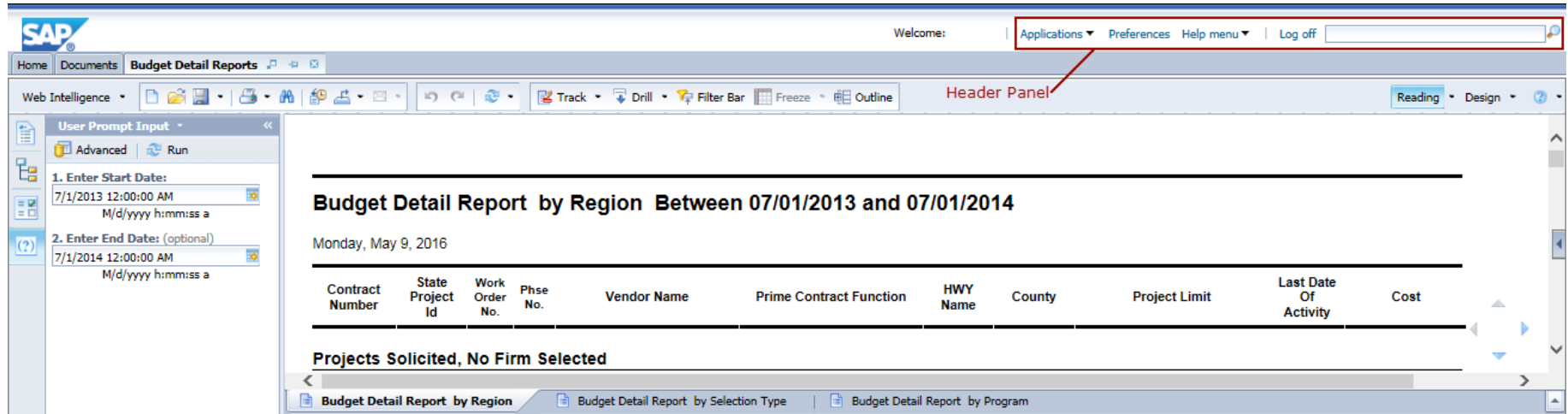
- The **Documents** tab has three drawers, including **My Documents**, **Folders** and **Search**. Elements on each drawer control the information displayed in the main panel. CARS reports are documents in SAP BusinessObjects terms, and multi
 - **My Documents** contains **My Favorites** where non-public BO Reports may be stored, your **Inbox** for messages, and **Personal Categories**.



- **Folders** contains the **Public Folders** in the side panel and a list of documents in the main panel. When you open **Public Folders** and click the **CARS** subfolder, a list of CARS documents (reports) is shown in the main panel.
- **Search** contains a search field. When you search for a term, the results are shown in the main panel, and tools for limiting the results are shown in the side panel.

Header Panel

The header panel is present on all tabs. There are five menu items on it.



- **Applications** contains a link to the Web Intelligence application. Most users do not have access to the application or the underlying data sources.
- **Preferences** allows you to set options, including the default page that opens when you click BO Reports in CARS, location and time zone, Crystal Reports preferences, and more.
- **Help menu** allows you to open the SAP documentation and to view information about SAP BusinessObjects.
- **Log Off** closes BO Reports.
- **Search** allows you to locate documents and reports. All search results are listed, but you may not have access to an item. Search results are automatically displayed in the **Search** drawer.

Display and Report Controls

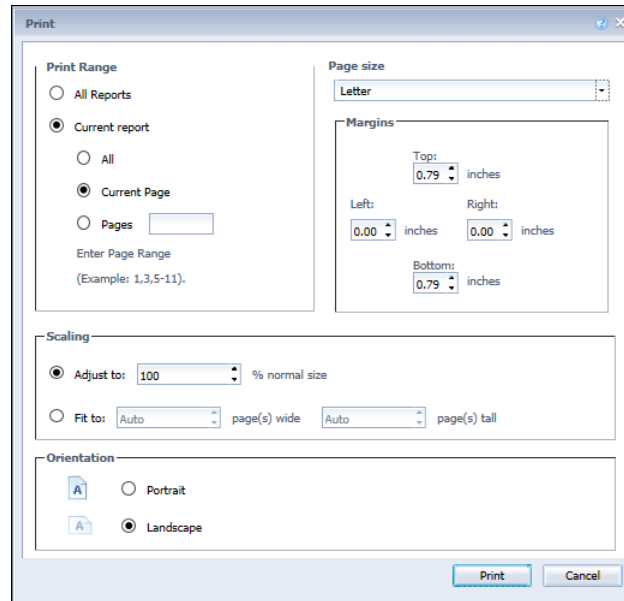
Display and report controls are present on Web Intelligence report tabs. They are not present on reports that are based SAP® Crystal Reports®.




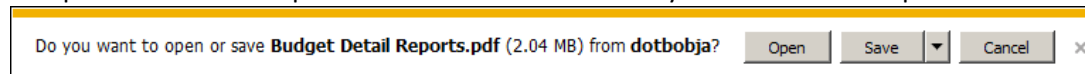
The screenshot displays the SAP Web Intelligence interface. At the top, the SAP logo and navigation links (Welcome, Applications, Preferences, Help menu, Log off) are visible. The main window title is 'Budget Detail Reports'. A toolbar labeled 'Display and Report Controls' includes options like Track, Drill, Filter Bar, Freeze, and Outline. On the left, a 'User Prompt Input' panel shows two prompts: '1. Enter Start Date:' with a value of '7/1/2013 12:00:00 AM' and '2. Enter End Date: (optional)' with a value of '7/1/2014 12:00:00 AM'. The main report area shows the title 'Budget Detail Report by Region Between 07/01/2013 and 07/01/2014' and the date 'Monday, May 9, 2016'. Below this is a table with the following columns: Contract Number, State Project Id, Work Order No., Phse No., Vendor Name, Prime Contract Function, HWY Name, County, Project Limit, Last Date Of Activity, and Cost. At the bottom, a 'Report Tabs' area shows three tabs: 'Budget Detail Report by Region' (selected), 'Budget Detail Report by Selection Type', and 'Budget Detail Report by Program'. The 'Status Bar' at the very bottom indicates 'Track changes: Off', 'Page 1 of 1+', '100%', and '340 days ago'.

- **Web Intelligence** menu contains controls for display options for the side panel, report tables and status bar.
- **New** is used to create new reports. Access to data sources is required.
- **Open** is used to open existing reports.
- **Save Menu** is used to save an open report. You can permanently save reports you have run - including specific data sets - as one of your favorites within the reports folder and (optionally) a different file name using the **Save As** command. The **Save** command is disabled for public reports.
- **Print** menu allows you to save reports or to export reports you have run as PDF files. Click the **Print** menu arrow and then click **Print** to open the **Print** dialog box (shown below). Set the options needed, and then click **Print**. SAP BusinessObjects opens the Internet Explorer download toolbar.





Click the **Print** icon  to open the Internet Explorer download toolbar directly. You can save or open the entire current report as-is.



Use the print functions in Adobe Acrobat or Reader to print hard copies of the report.

- **Find** turns the **Search Bar** on and off. The **Search Bar**, when activated, is located at the bottom left of the report panel.

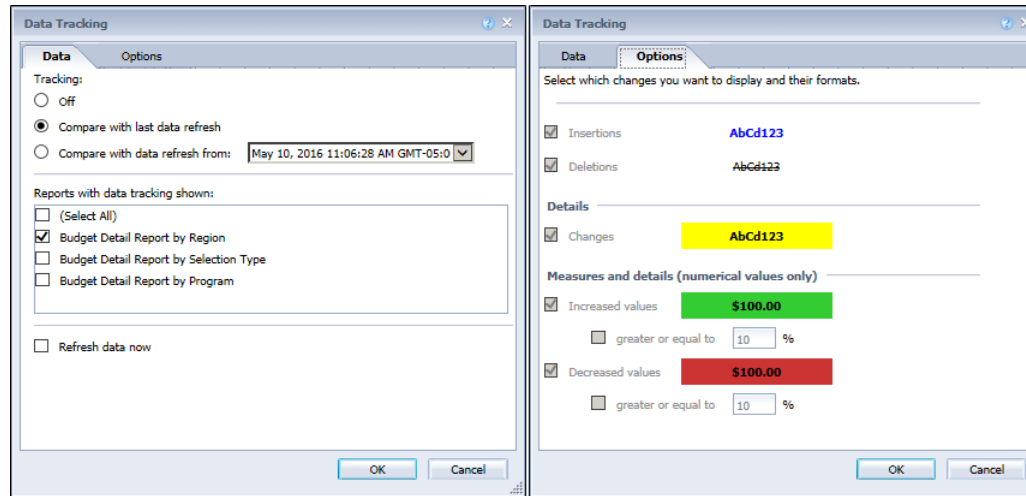


- **History** opens a list of dates for saved copies of the report.
- **Export** menu allows you to export documents or current reports as PDF, Excel, comma separated values (CSV) or text. SAP BusinessObjects opens the Internet Explorer download toolbar to save the document or report. Exporting a document saves the entire report, including data across multiple tabs. Exporting a current report saves only the current report, including data from only the currently active tab. See [BI Launch Pad](#) Help for more information.
- **Send to** is disabled.
- **Undo** reverses the last action, such as refreshing the data or drilling data.
- **Redo** repeats the last action, such as showing or hiding a report section in outline mode.
- **Refresh** menu allows you to reload the currently displayed report or all reports with the most current data from the data source (CARS)



application).

- **Track** menu turns on and off the ability to see changes in the data over time. Click **Track** to set options, and click **OK**. Refresh the data to see the new report with changes highlighted. Use the **Options** tab to view the predefined change notation. See [BI Launch Pad Help](#) for more information.



Sample data showing tracked changes:

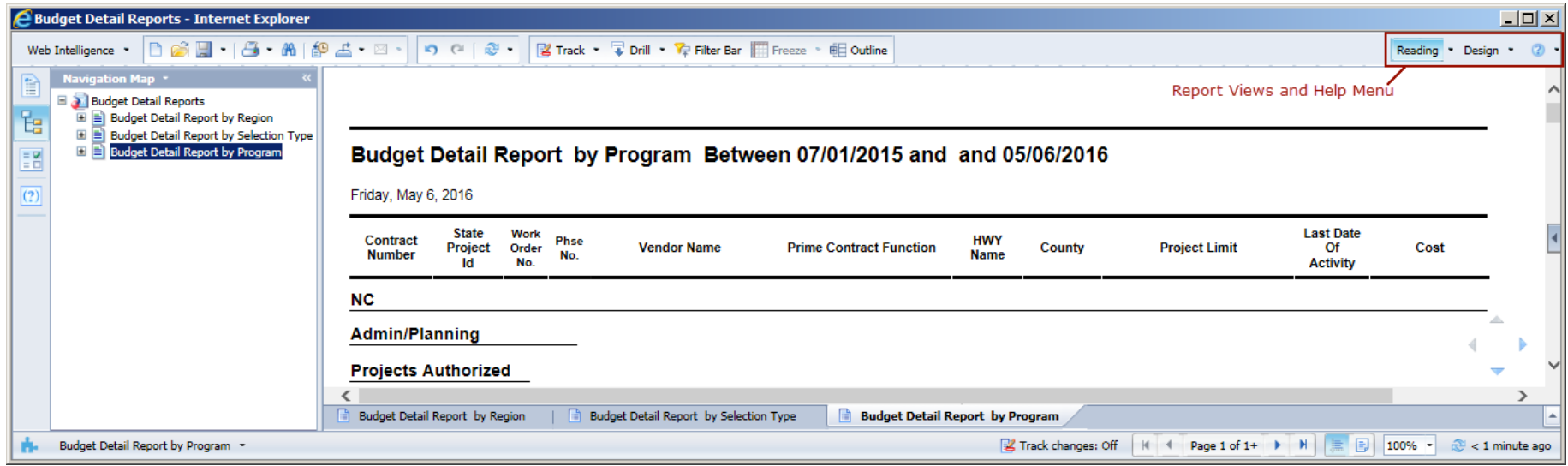
80	AECOM Technical Services, Inc.	0656-32-50	10	1400006082	90990	5	Approved	BTS	Peter Kemp
81	AECOM Technical Services, Inc.	1000-00-27	12	1400006082	91336	5	Approved	SE	Joe Gallamore
82	AECOM Technical Services, Inc.	1003-10-01		1400014043	91287	5	Approved	SW	Steve Marshall
85	AECOM Technical Services, Inc.	1003-10-01		1400014043	91287	5	Approved	SW	Steve Marshall
83	AECOM Technical Services, Inc.	1003-10-02		1400006402	90267	5	Approved	SW	Steve Marshall

- **Drill** menu first causes SAP BusinessObjects to make a copy of the current report and open the **Filter Bar**. See [BI Launch Pad Help](#) for more information.
- **Filter Bar** allows you to limit the results that are displayed in the report using simple filters. See [BI Launch Pad Help](#) for more information.
- **Freeze** allows you to select header rows or columns that do not scroll when you move within the report. See [BI Launch Pad Help](#) for more information.
- **Outline** opens and closes a bar along the left side of the report window that allows you to show and hide sections of the current report as defined by the report headers. See [BI Launch Pad Help](#) for more information.



Report Views and Help Menu

Report views determine the mode in which reports are viewed, and the help menu provides links to online documentation and tutorials.



There are two views for SAP BusinessObjects reports. CARS reports should be viewed in **Reading** mode. **Design** mode is for constructing new reports, and most users do not have access to the application or the necessary data sources.

The **Help** menu is comprised of *Help Contents (F1)*, *Tutorials*, and *About*. The *Help Contents (F1)* and *Tutorials* items are links to online documentation and training resources. The *About* item opens a message that gives version and copyright information.

Side Panel Tabs

Side panel tabs change the information and tools displayed in the side panel.

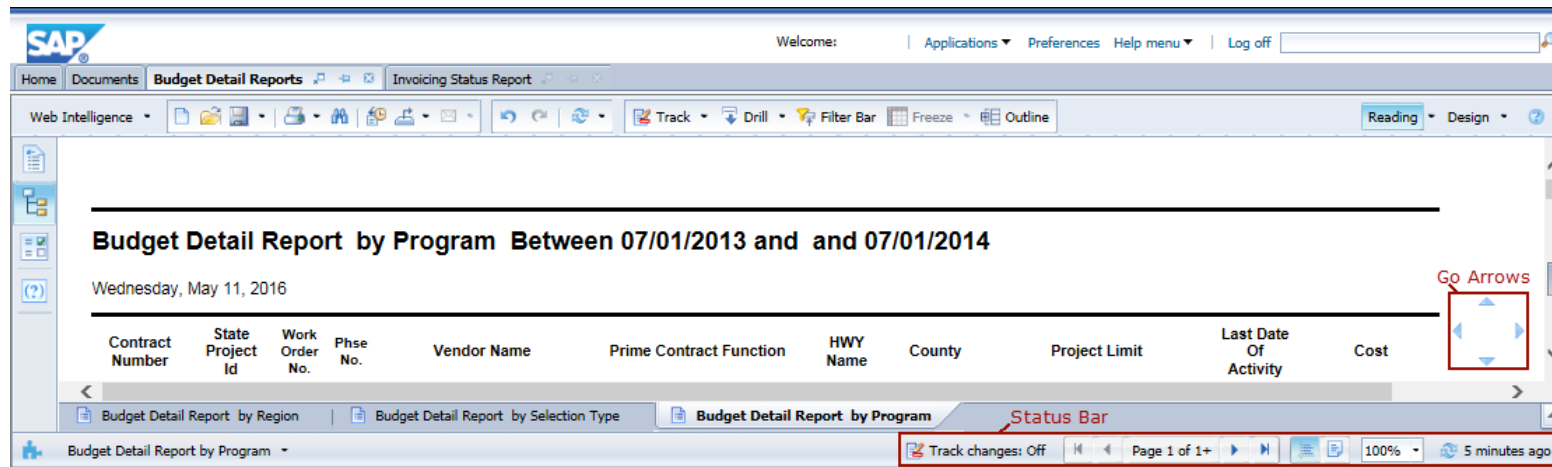


- **Document Summary** shows report properties, including general, statistics, document and data options, and report parameters with the current values.
- **Navigation Map** shows all of the reports (tabs) in a document
- **Input Controls** shows all of the parameter variants for the report and provides tools to edit the variants.
- **User Prompt Input** shows the default values for the report parameter variants and provides tools to edit the variants for the currently open report. New parameters you enter do not change the report defaults permanently.

Status Bar and Go Arrows

The **Status Bar** appears on the lower right of the report window when you activate it using the control under Web Intelligence. The **Go** arrows always appear in the lower right corner of the report window.





- **Track changes** describes the
- **Go to Page** controls allow you to navigate within the pages of a report (limited to the current tab).
- Display modes show the report data in **Quick Display** mode (continuous) or in **Page** mode (in print layout for 8.5 x 11-inch pages)
- **Zoom** enlarges or reduces the display of the current report
- Refresh reloads data from the data source (CARS application) to show the most current data



Report Tabs

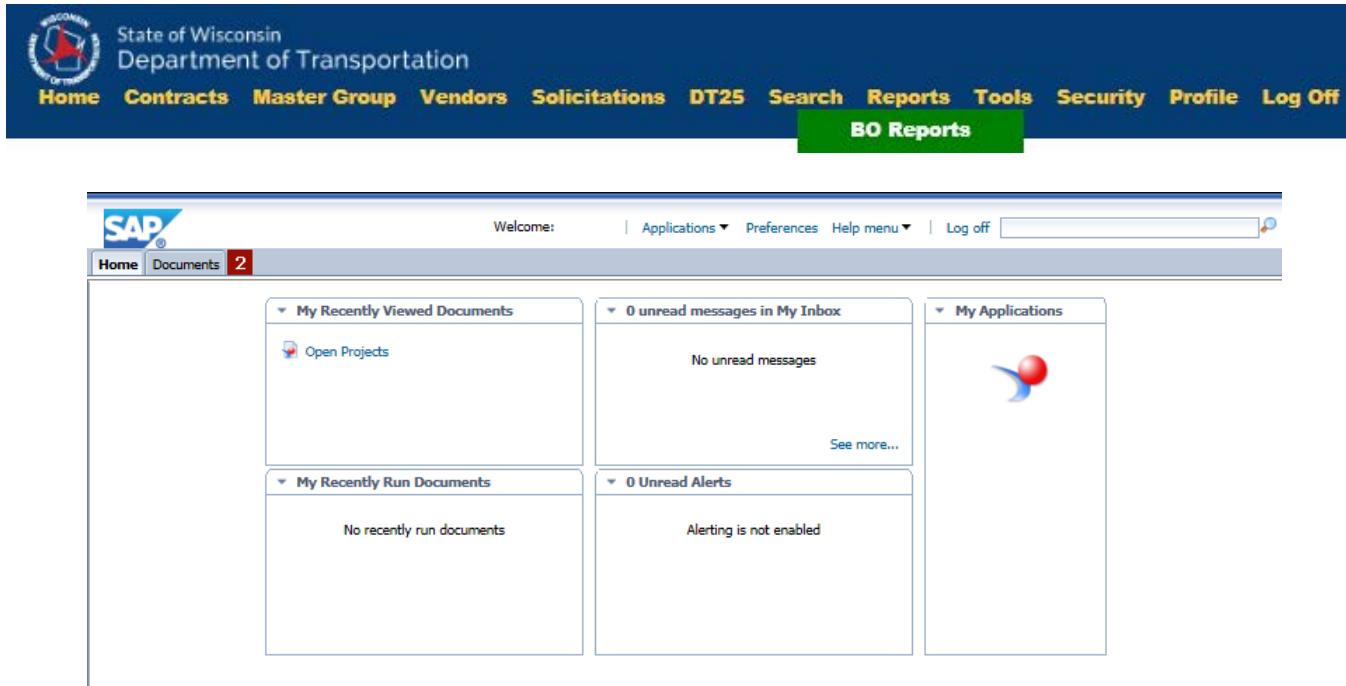
The screenshot shows an Internet Explorer browser window titled 'Budget Detail Reports - Internet Explorer'. The address bar contains 'Web Intelligence'. The main content area displays a report titled 'Budget Detail Report by Program Between 07/01/2015 and and 05/06/2016' dated 'Friday, May 6, 2016'. The report includes a table with the following columns: Contract Number, State Project Id, Work Order No., Phse No., Vendor Name, Prime Contract Function, HWY Name, County, Project Limit, Last Date Of Activity, and Cost. The table content is partially visible, showing 'NC' and 'Admin/Planning' under the 'Projects Authorized' section. A red label 'Report Tabs' is positioned above the browser's tab bar, which contains three tabs: 'Budget Detail Report by Region', 'Budget Detail Report by Selection Type', and 'Budget Detail Report by Program'. The status bar at the bottom indicates 'Track changes: Off', 'Page 1 of 1+', '100%', and '< 1 minute ago'.

Some reports have more than one tab because the results are displayed based on different criteria. For example, the Budget Detail Reports are sorted based on region, selection type and program; therefore, there are three tabs to display the different versions. Select a tab to view that version of the report.



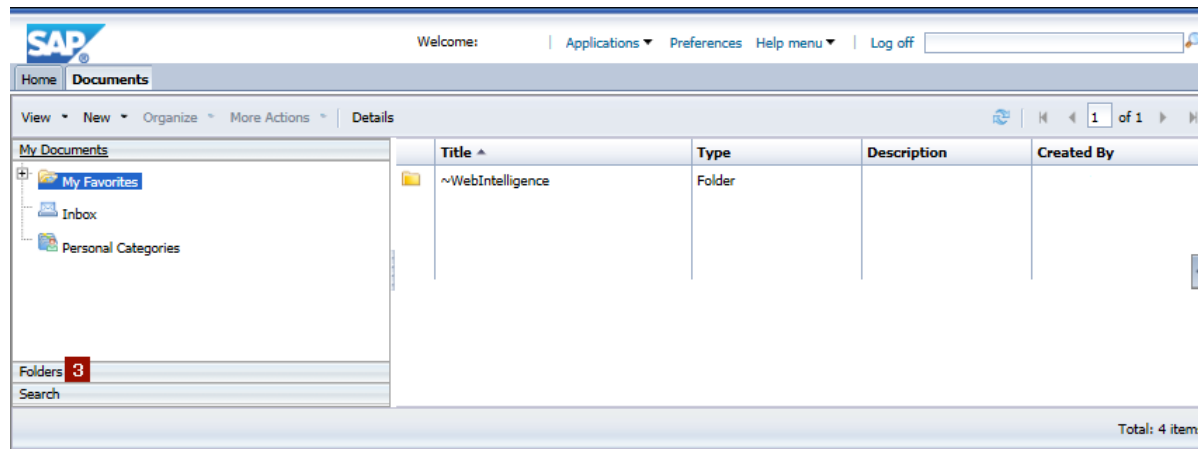
WisDOT: Run Reports

CARS reports are developed in the SAP BusinessObjects application as objects called Web Intelligence documents. The interface used to interact with CARS reports is known as the *BI launch pad*.

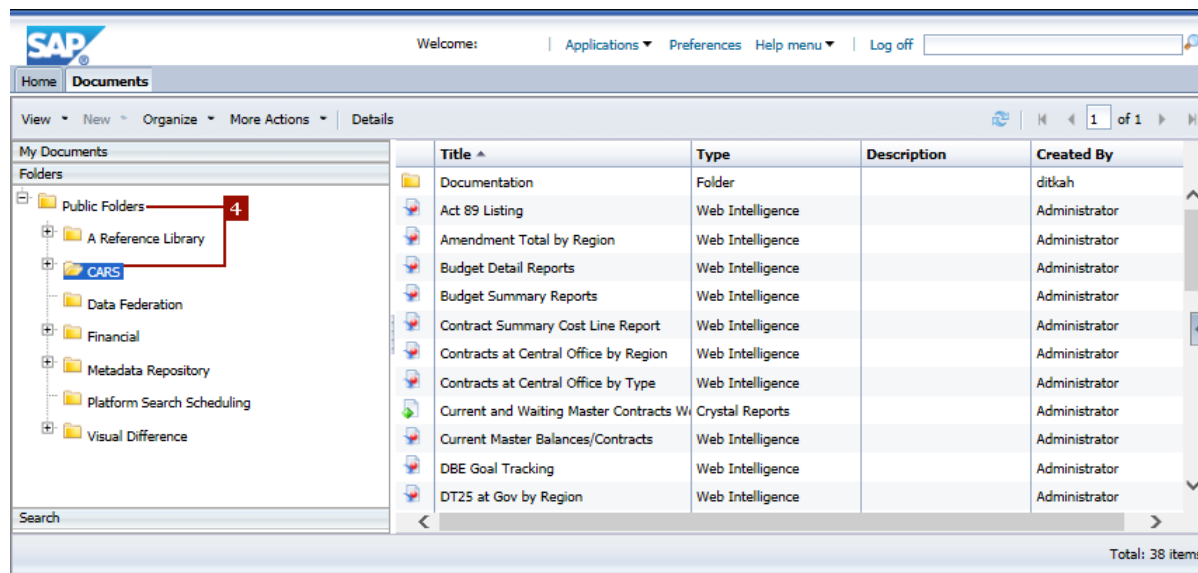


1. Click **BO Reports** on the CARS main menu. CARS opens the *BI Launch Pad* page on a new Internet Explorer tab.
2. Click **Documents** in the header panel. BI launch pad opens the *Documents* tab.





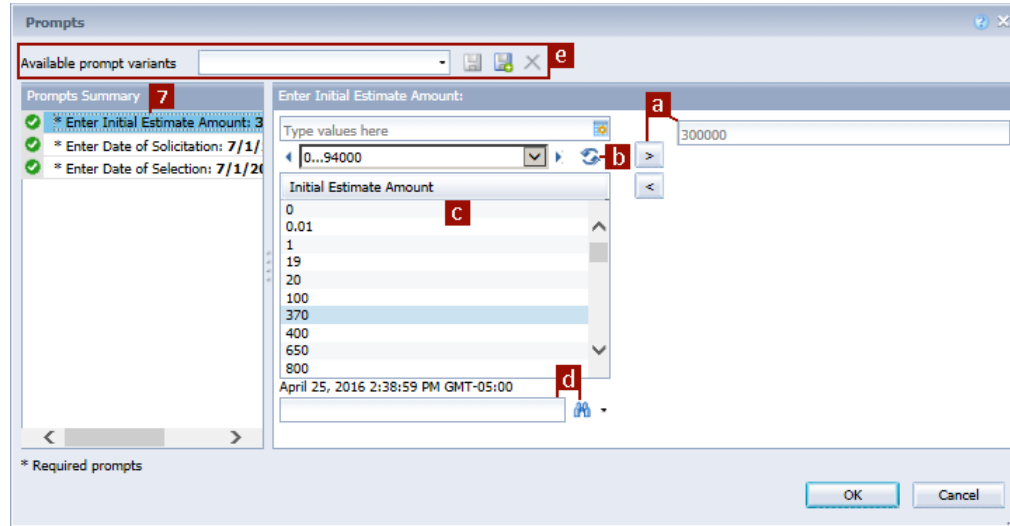
3. Click the **Folders** drawer to expand and display its contents.



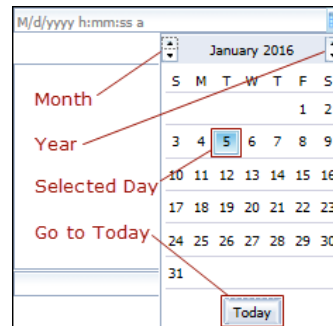
4. Expand **Public Folders** and click the **CARS** folder to see the list of CARS reports in the main panel.
5. Locate the report you need. Reports are listed alphabetically.
6. Double-click the report title to open the report. The report and any prompt dialog boxes open on a new SAP BusinessObjects tab. Some reports run automatically while others require that you enter prompt variants. If variants are required, you must enter them as described on






the **Prompts** dialog boxes.










7. Some reports run automatically. However, many reports open a **Prompts** dialog box before the report runs. To enter or edit a prompt variant, first select the variant in the list in the left panel of the **Prompts** dialog box. Then you can use any of the following methods to set the parameter:
 - a. Change the value in the prompt field directly.

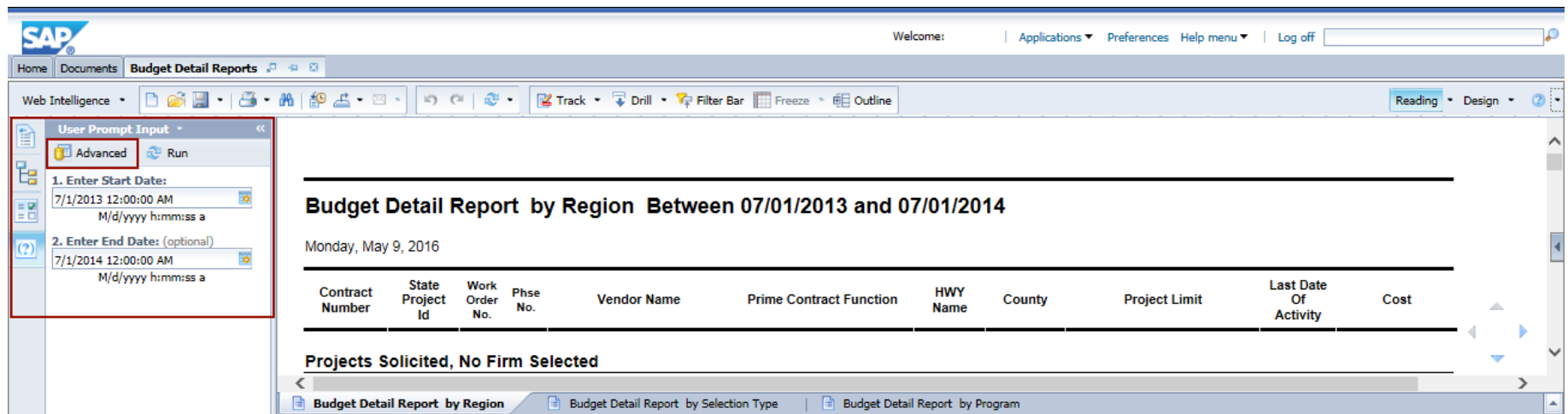


For date variants, CARS provides a calendar button  on the right-hand side of the field. The calendar button opens a calendar control that helps you enter dates quickly. Use the scroll buttons on the left to change the month and the scroll buttons on the right to change the year. Then select the day in the calendar. Click **Today** to automatically enter today's date in the prompt field. The default time is 12:00:00 AM.

Then click **Add from List of Values**  to copy the parameter into the prompt field. Click **Remove selected value(s)**  to clear the prompt field.



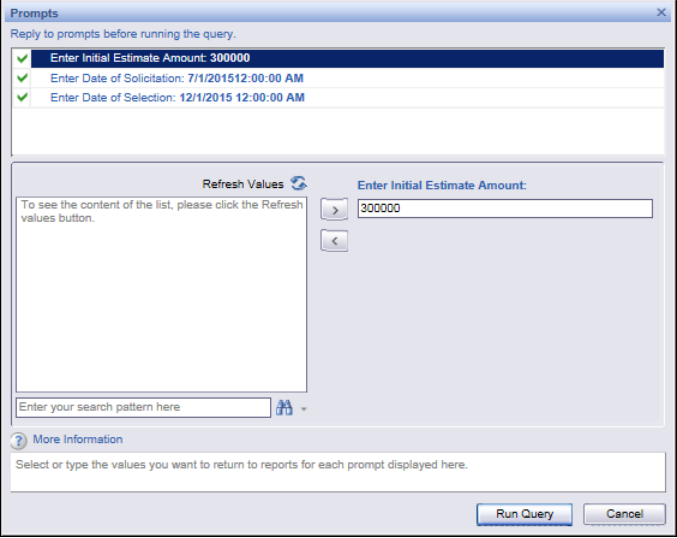
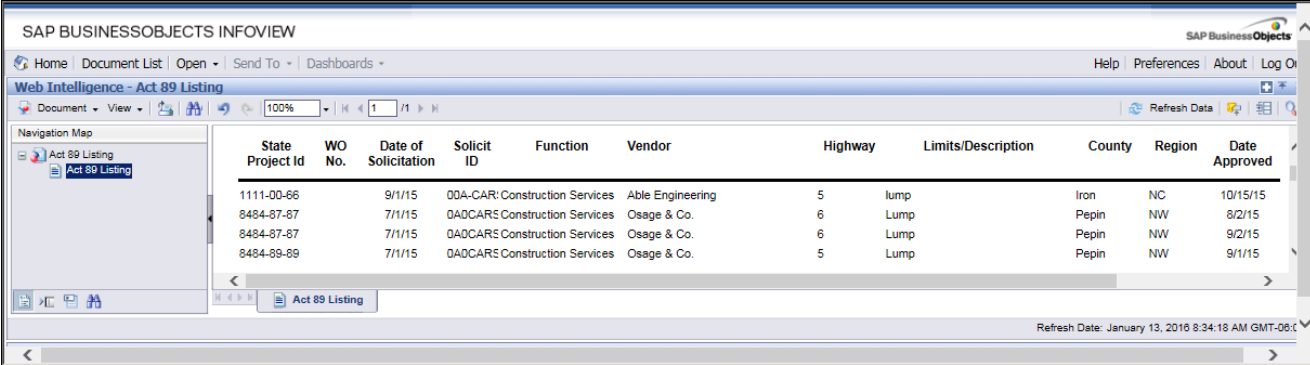
- b. Click **Refresh**  to generate a list of available values for the variant in CARS. Continue through step “c” to enter a value for the variant in the **Variant** field.
 - c. Select a value in the **List of Values** field.
If the list of available values is long, use the **Go to next chunk**  and **Go to previous chunk**  arrows to move quickly in the list, or use the drop down to move to any chunk. Use the scroll bar to view different parts of the list.
Click **Add from List of Values**  to copy the parameter into the prompt field. Click **Remove selected value(s)**  to clear the prompt field.
 - d. Enter a value in the search field and click **Search**  to find similar values in CARS. The search function will show all matching values in the **List of Values** field. For example, a search for “45” returns all values containing this sequence, including 45, 4500, 45000, 245000, 10145 and 64549. You can use the search arrow  to specify whether text searches are case-sensitive or not.
 - e. The *Available prompt variants* tools are not enabled for WisDOT. You can add variants, but they do not appear in or affect the reports.
8. When all prompts are entered, click **OK** to run the report. Some reports will take a short time to process before results are displayed.



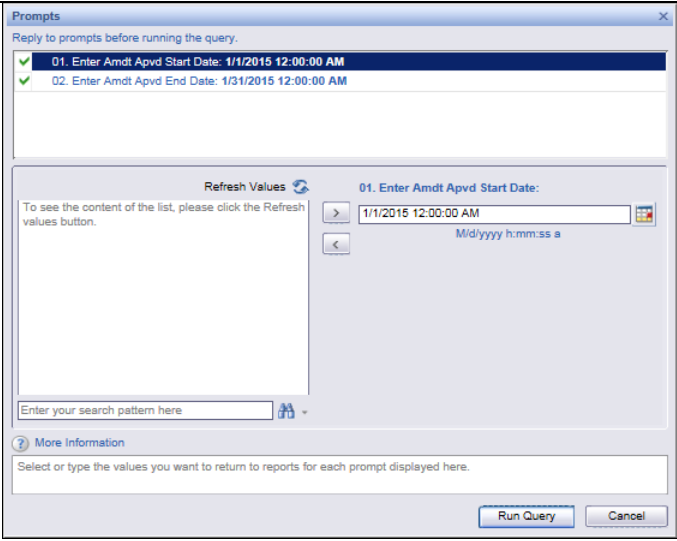
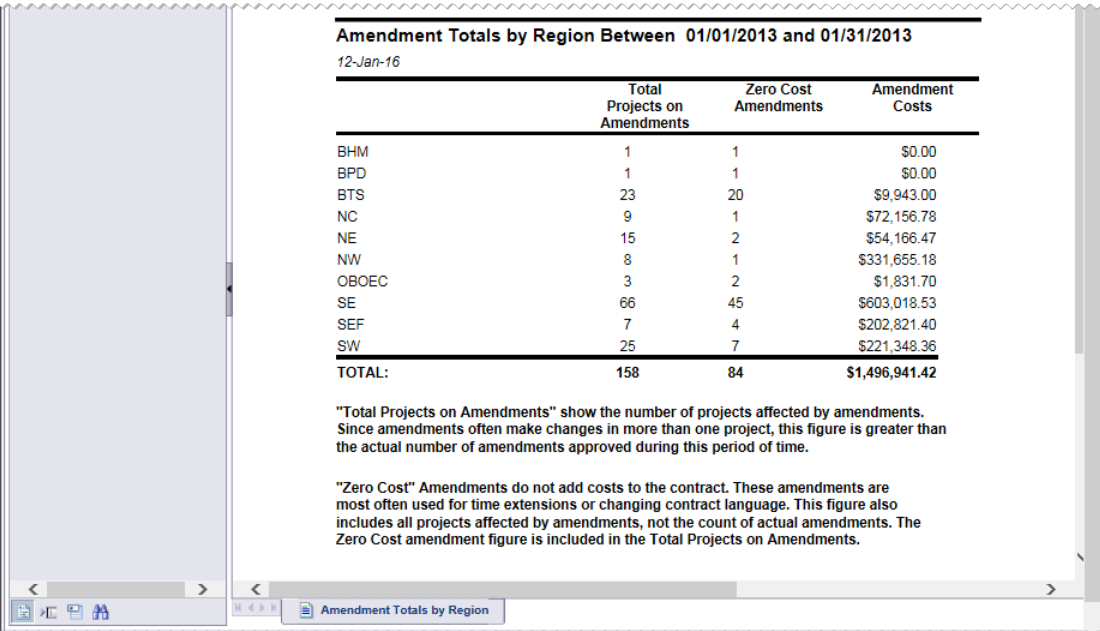
When the report is open, you can use the **User Prompt Input** side panel tab to change the input variants for the report directly in the input boxes. Press **Enter** on the keyboard to re-run the report with the new variants. Click **Advanced** to open the **Prompts** dialog box as shown in step 7.



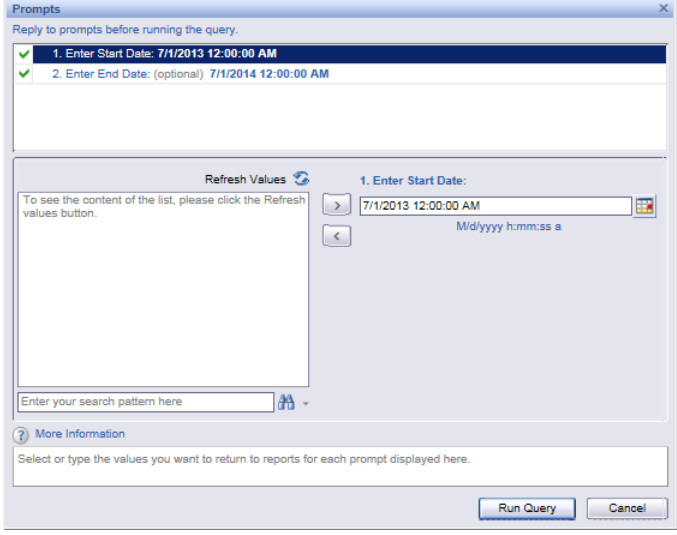
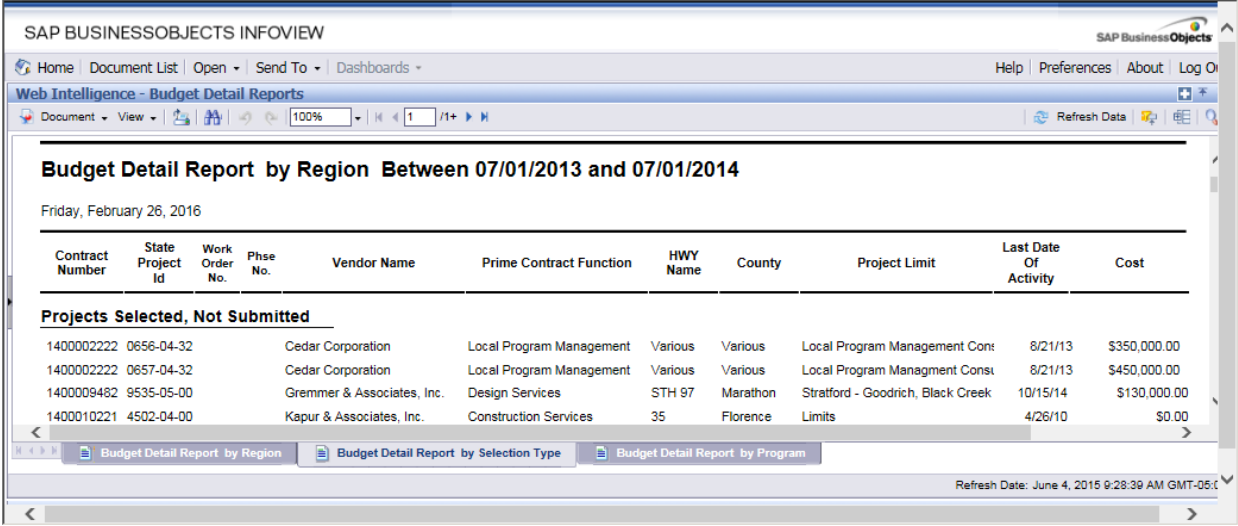
Report Descriptions

Report	Description	Prompt and Results Dialog Box Images
<p>Act 89 Listing</p>	<p>Lists projects that require ACT 89 public notification.</p> <p>A cost benefit analysis is required for contracts and work orders with estimated costs of \$300,000 or more.</p> <p>Prompts - all are required:</p> <ul style="list-style-type: none"> • Initial Estimate amount - may be any number, including zero • Date of Solicitation - format as MM/DD/YYYY; must match the solicitation date • Date of Selection - format as MM/DD/YYYY; must match the solicitation date 	 

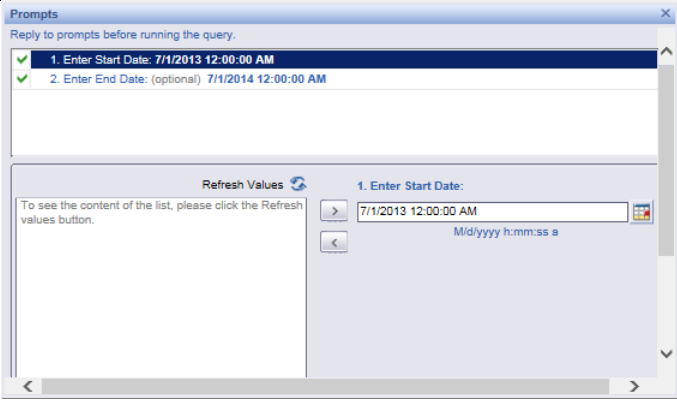
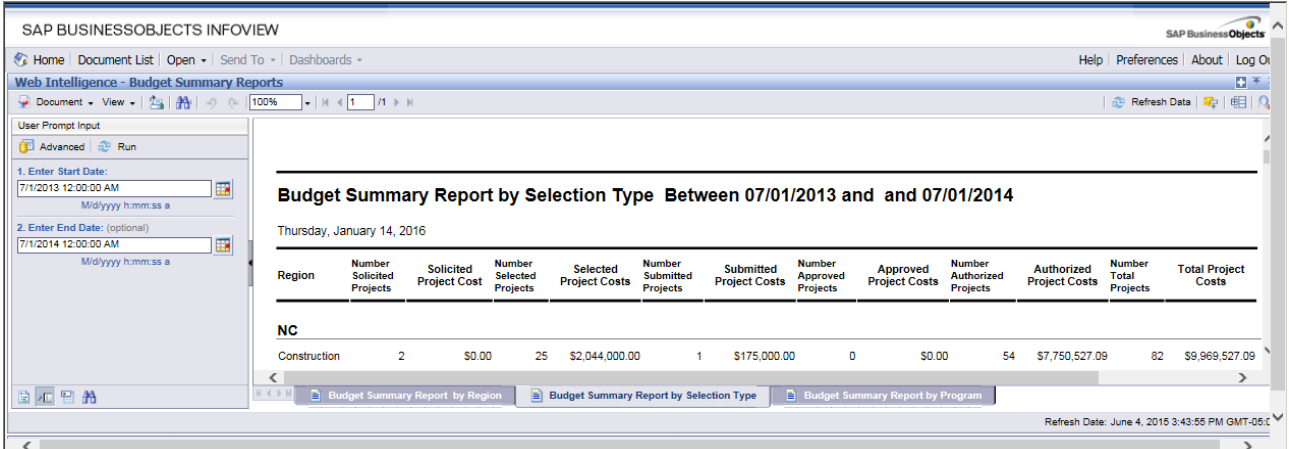


Report	Description	Prompt and Results Dialog Box Images																																																								
<p>Amendment Total by Region</p>	<p>Lists total amendments and amendment costs by region.</p> <p>Prompts - all are required:</p> <ul style="list-style-type: none"> • Amdt Apvd Start Date - start date of the date range during which the amendment was approved • Amdt Apvd End Date - end date of the date range during which the amendment was approved 	  <table border="1" data-bbox="1134 779 1774 1144"> <thead> <tr> <th colspan="4">Amendment Totals by Region Between 01/01/2013 and 01/31/2013</th> </tr> <tr> <th colspan="4">12-Jan-16</th> </tr> <tr> <th></th> <th>Total Projects on Amendments</th> <th>Zero Cost Amendments</th> <th>Amendment Costs</th> </tr> </thead> <tbody> <tr> <td>BHM</td> <td>1</td> <td>1</td> <td>\$0.00</td> </tr> <tr> <td>BPD</td> <td>1</td> <td>1</td> <td>\$0.00</td> </tr> <tr> <td>BTS</td> <td>23</td> <td>20</td> <td>\$9,943.00</td> </tr> <tr> <td>NC</td> <td>9</td> <td>1</td> <td>\$72,156.78</td> </tr> <tr> <td>NE</td> <td>15</td> <td>2</td> <td>\$54,186.47</td> </tr> <tr> <td>NW</td> <td>8</td> <td>1</td> <td>\$331,655.18</td> </tr> <tr> <td>OBOEC</td> <td>3</td> <td>2</td> <td>\$1,831.70</td> </tr> <tr> <td>SE</td> <td>66</td> <td>45</td> <td>\$603,018.53</td> </tr> <tr> <td>SEF</td> <td>7</td> <td>4</td> <td>\$202,821.40</td> </tr> <tr> <td>SW</td> <td>25</td> <td>7</td> <td>\$221,348.36</td> </tr> <tr> <td>TOTAL:</td> <td>158</td> <td>84</td> <td>\$1,496,941.42</td> </tr> </tbody> </table> <p data-bbox="1134 1161 1753 1218">"Total Projects on Amendments" show the number of projects affected by amendments. Since amendments often make changes in more than one project, this figure is greater than the actual number of amendments approved during this period of time.</p> <p data-bbox="1134 1234 1753 1307">"Zero Cost" Amendments do not add costs to the contract. These amendments are most often used for time extensions or changing contract language. This figure also includes all projects affected by amendments, not the count of actual amendments. The Zero Cost amendment figure is included in the Total Projects on Amendments.</p>	Amendment Totals by Region Between 01/01/2013 and 01/31/2013				12-Jan-16					Total Projects on Amendments	Zero Cost Amendments	Amendment Costs	BHM	1	1	\$0.00	BPD	1	1	\$0.00	BTS	23	20	\$9,943.00	NC	9	1	\$72,156.78	NE	15	2	\$54,186.47	NW	8	1	\$331,655.18	OBOEC	3	2	\$1,831.70	SE	66	45	\$603,018.53	SEF	7	4	\$202,821.40	SW	25	7	\$221,348.36	TOTAL:	158	84	\$1,496,941.42
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NE	15	2	\$54,186.47																																																							
NW	8	1	\$331,655.18																																																							
OBOEC	3	2	\$1,831.70																																																							
SE	66	45	\$603,018.53																																																							
SEF	7	4	\$202,821.40																																																							
SW	25	7	\$221,348.36																																																							
TOTAL:	158	84	\$1,496,941.42																																																							

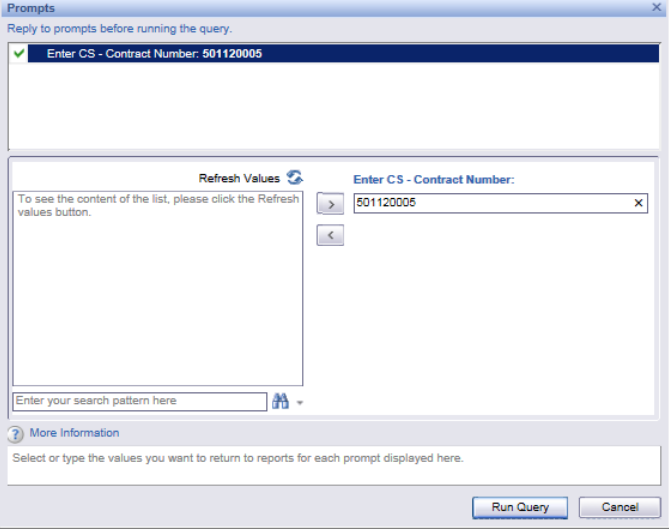


Report	Description	Prompt and Results Dialog Box Images																																																																		
<p>Budget Detail Reports</p>	<p>Details projects that are in solicitation, selection, submitted or authorized status, along with their total costs. The three tabs for this report show the data by region, selection type and program. The budget detail by selection type report is subdivided by Construction and Design/Other contracts, and then by status.</p> <p>Prompts - start date is required; end date is optional:</p> <ul style="list-style-type: none"> • Start Date- start date of the date range • End Date - end date of the date range 	  <table border="1"> <thead> <tr> <th>Contract Number</th> <th>State Project Id</th> <th>Work Order No.</th> <th>Phse No.</th> <th>Vendor Name</th> <th>Prime Contract Function</th> <th>HWY Name</th> <th>County</th> <th>Project Limit</th> <th>Last Date Of Activity</th> <th>Cost</th> </tr> </thead> <tbody> <tr> <td colspan="11">Projects Selected, Not Submitted</td> </tr> <tr> <td>1400002222</td> <td>0656-04-32</td> <td></td> <td></td> <td>Cedar Corporation</td> <td>Local Program Management</td> <td>Various</td> <td>Various</td> <td>Local Program Management Con:</td> <td>8/21/13</td> <td>\$350,000.00</td> </tr> <tr> <td>1400002222</td> <td>0657-04-32</td> <td></td> <td></td> <td>Cedar Corporation</td> <td>Local Program Management</td> <td>Various</td> <td>Various</td> <td>Local Program Management Const:</td> <td>8/21/13</td> <td>\$450,000.00</td> </tr> <tr> <td>1400009482</td> <td>9535-05-00</td> <td></td> <td></td> <td>Gremmer & Associates, Inc.</td> <td>Design Services</td> <td>STH 97</td> <td>Marathon</td> <td>Stratford - Goodrich, Black Creek</td> <td>10/15/14</td> <td>\$130,000.00</td> </tr> <tr> <td>1400010221</td> <td>4502-04-00</td> <td></td> <td></td> <td>Kapur & Associates, Inc.</td> <td>Construction Services</td> <td>35</td> <td>Florence</td> <td>Limits</td> <td>4/26/10</td> <td>\$0.00</td> </tr> </tbody> </table>	Contract Number	State Project Id	Work Order No.	Phse No.	Vendor Name	Prime Contract Function	HWY Name	County	Project Limit	Last Date Of Activity	Cost	Projects Selected, Not Submitted											1400002222	0656-04-32			Cedar Corporation	Local Program Management	Various	Various	Local Program Management Con:	8/21/13	\$350,000.00	1400002222	0657-04-32			Cedar Corporation	Local Program Management	Various	Various	Local Program Management Const:	8/21/13	\$450,000.00	1400009482	9535-05-00			Gremmer & Associates, Inc.	Design Services	STH 97	Marathon	Stratford - Goodrich, Black Creek	10/15/14	\$130,000.00	1400010221	4502-04-00			Kapur & Associates, Inc.	Construction Services	35	Florence	Limits	4/26/10	\$0.00
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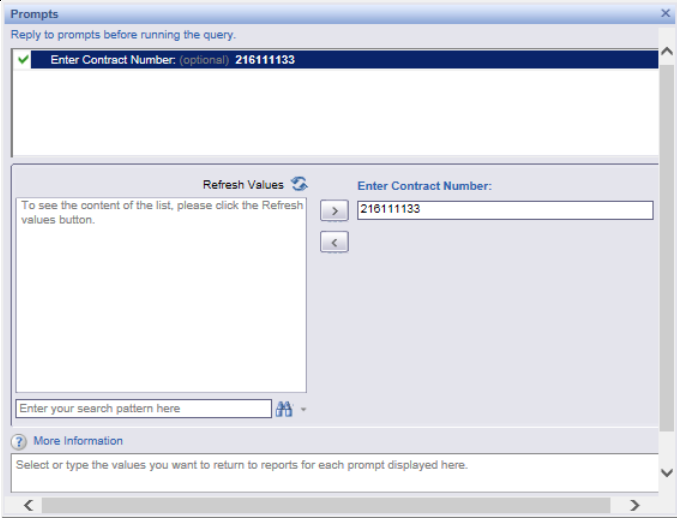
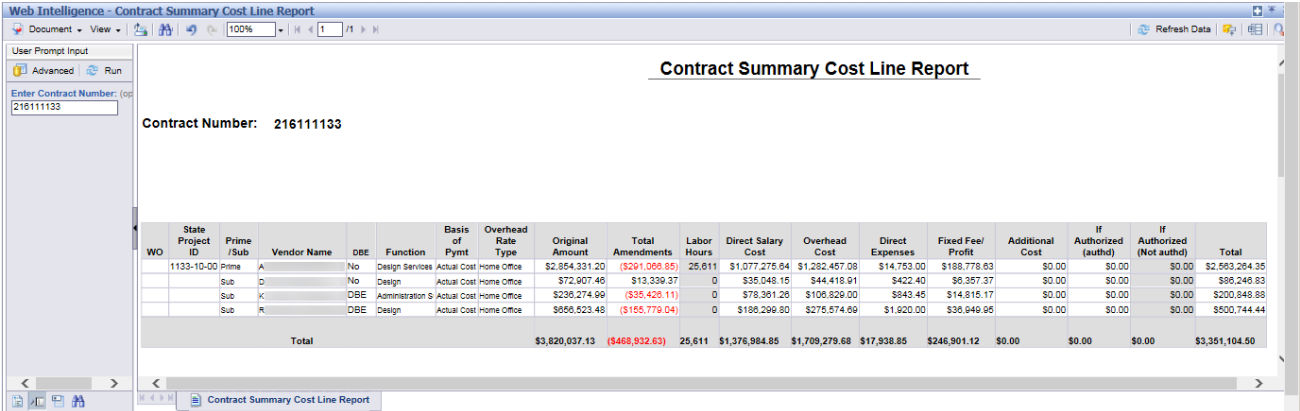


Report	Description	Prompt and Results Dialog Box Images
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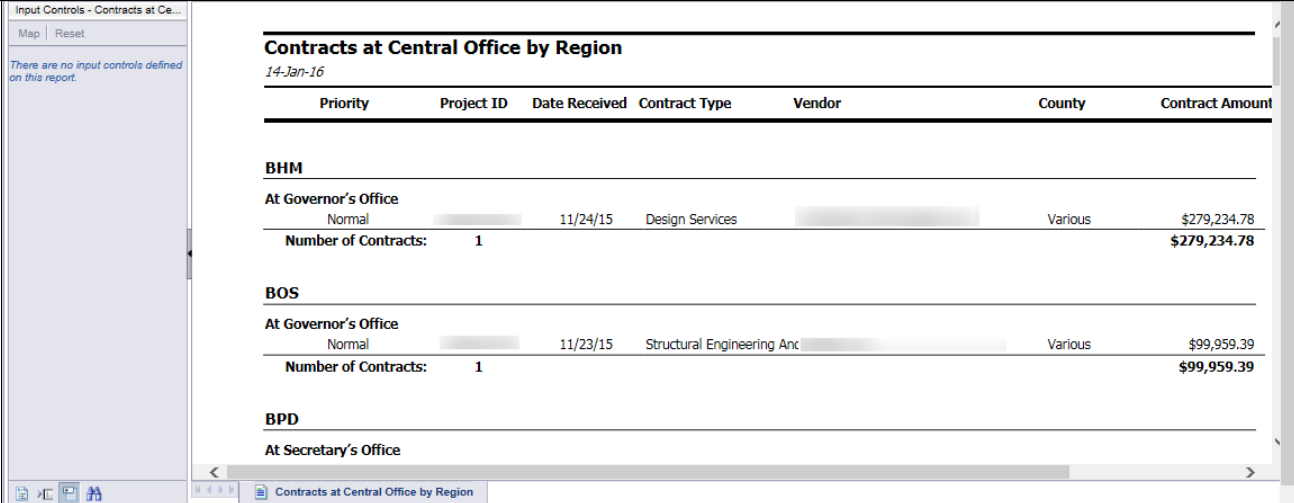
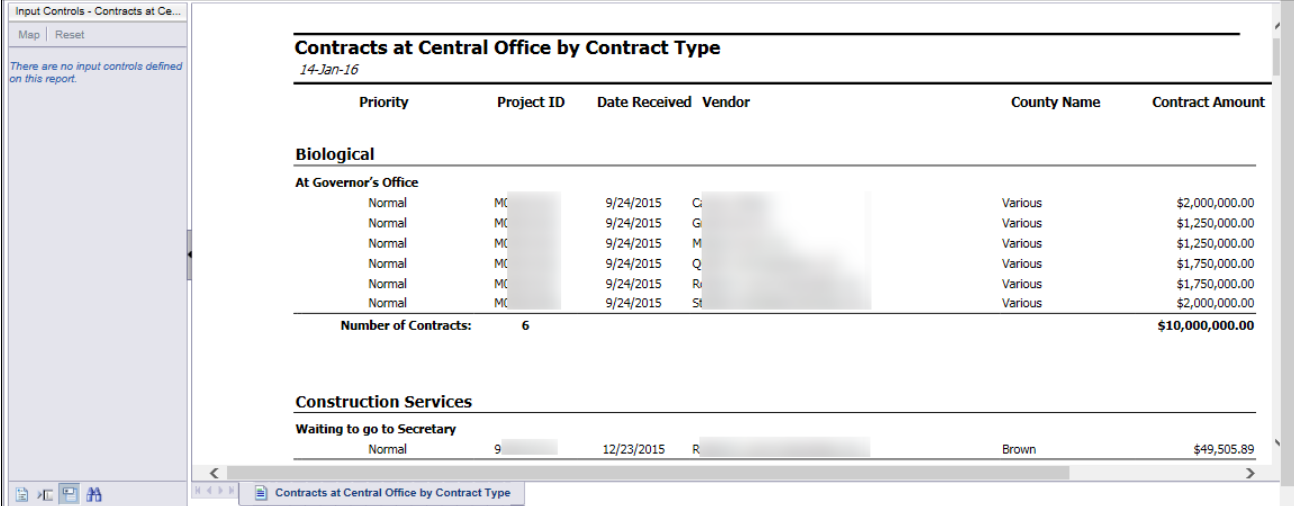


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For master contracts, all work orders are listed.</p> <p>Prompt - required:</p> <ul style="list-style-type: none"> Contract Number 	 <p>Contract Summary Master Contract</p> <p>Contract Number: 501120005 Master Contract Id: M</p> <table border="1"> <thead> <tr> <th>WO</th> <th>State</th> <th>Prime /Sub</th> <th>Vendor Name</th> <th>DBE</th> <th>Original Amount</th> <th>Total Amendments</th> <th>Labor Hours</th> <th>Direct Salary Cost</th> <th>Overhead Cost</th> <th>Fixed Fee/ Profit</th> <th>Direct Expenses</th> <th>Additional Cost</th> <th>If Authorized (authd)</th> <th>If Authorized (Not authd)</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>Prime</td> <td></td> <td>No</td> <td>\$825,000.00</td> <td>\$0.00</td> <td>0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td colspan="5">Total</td> <td>\$825,000.00</td> <td>\$0.00</td> <td>0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> </tr> </tbody> </table> <p>Contract Summary Contract</p> <p>Contract Number: 216111133</p> <table border="1"> <thead> <tr> <th>WO</th> <th>State</th> <th>Prime /Sub</th> <th>Vendor Name</th> <th>DBE</th> <th>Original Amount</th> <th>Total Amendments</th> <th>Labor Hours</th> <th>Direct Salary Cost</th> <th>Overhead Cost</th> <th>Fixed Fee/ Profit</th> <th>Direct Expenses</th> <th>Additional Cost</th> <th>If Authorized (authd)</th> <th>If Authorized (Not authd)</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>1133-10-00</td> <td></td> <td>Prime</td> <td>A</td> <td>No</td> <td>\$2,854,331.20</td> <td>(\$291,096.85)</td> <td>25,611.00</td> <td>\$1,077,276.84</td> <td>\$1,282,457.08</td> <td>\$188,778.03</td> <td>\$14,753.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$2,563,264.35</td> </tr> <tr> <td></td> <td></td> <td>Sub</td> <td>D</td> <td>No</td> <td>\$72,907.48</td> <td>\$13,339.37</td> <td>0.00</td> <td>\$35,048.15</td> <td>\$44,418.91</td> <td>\$8,357.37</td> <td>\$422.40</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$86,246.83</td> </tr> <tr> <td></td> <td></td> <td>Sub</td> <td>K</td> <td>DBE</td> <td>\$236,274.09</td> <td>(\$35,426.11)</td> <td>0.00</td> <td>\$78,361.26</td> <td>\$106,829.00</td> <td>\$14,815.17</td> <td>\$843.45</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$200,848.88</td> </tr> <tr> <td></td> <td></td> <td>Sub</td> <td>R</td> <td>DBE</td> <td>\$656,523.48</td> <td>(\$155,779.04)</td> <td>0.00</td> <td>\$188,299.80</td> <td>\$275,574.60</td> <td>\$38,949.95</td> <td>\$1,920.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$500,744.44</td> </tr> <tr> <td colspan="5">Total</td> <td>\$3,820,037.13</td> <td>(\$468,932.63)</td> <td>25,611.00</td> <td>\$1,376,984.85</td> <td>\$1,709,278.68</td> <td>\$246,901.12</td> <td>\$17,938.85</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$3,351,104.50</td> </tr> <tr> <td colspan="5">Contract Totals</td> <td>\$3,820,037.13</td> <td>(\$468,932.63)</td> <td>25,611.00</td> <td>\$1,376,984.85</td> <td>\$1,709,278.68</td> <td>\$246,901.12</td> <td>\$17,938.85</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$3,351,104.50</td> </tr> </tbody> </table>	WO	State	Prime /Sub	Vendor Name	DBE	Original Amount	Total Amendments	Labor Hours	Direct Salary Cost	Overhead Cost	Fixed Fee/ Profit	Direct Expenses	Additional Cost	If Authorized (authd)	If Authorized (Not authd)	Total			Prime		No	\$825,000.00	\$0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Total					\$825,000.00	\$0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	WO	State	Prime /Sub	Vendor Name	DBE	Original Amount	Total Amendments	Labor Hours	Direct Salary Cost	Overhead Cost	Fixed Fee/ Profit	Direct Expenses	Additional Cost	If Authorized (authd)	If Authorized (Not authd)	Total	1133-10-00		Prime	A	No	\$2,854,331.20	(\$291,096.85)	25,611.00	\$1,077,276.84	\$1,282,457.08	\$188,778.03	\$14,753.00	\$0.00	\$0.00	\$0.00	\$2,563,264.35			Sub	D	No	\$72,907.48	\$13,339.37	0.00	\$35,048.15	\$44,418.91	\$8,357.37	\$422.40	\$0.00	\$0.00	\$0.00	\$86,246.83			Sub	K	DBE	\$236,274.09	(\$35,426.11)	0.00	\$78,361.26	\$106,829.00	\$14,815.17	\$843.45	\$0.00	\$0.00	\$0.00	\$200,848.88			Sub	R	DBE	\$656,523.48	(\$155,779.04)	0.00	\$188,299.80	\$275,574.60	\$38,949.95	\$1,920.00	\$0.00	\$0.00	\$0.00	\$500,744.44	Total					\$3,820,037.13	(\$468,932.63)	25,611.00	\$1,376,984.85	\$1,709,278.68	\$246,901.12	\$17,938.85	\$0.00	\$0.00	\$0.00	\$3,351,104.50	Contract Totals					\$3,820,037.13	(\$468,932.63)	25,611.00	\$1,376,984.85	\$1,709,278.68	\$246,901.12	\$17,938.85	\$0.00	\$0.00	\$0.00	\$3,351,104.50
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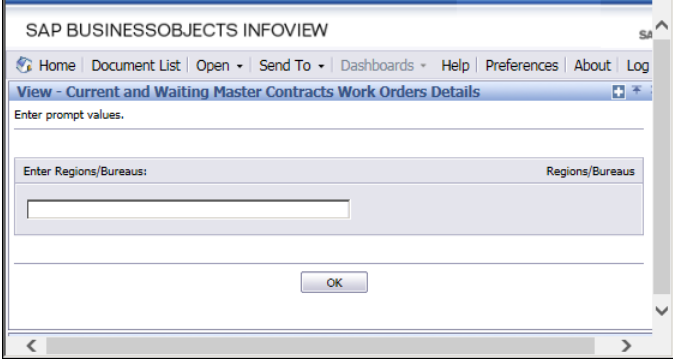
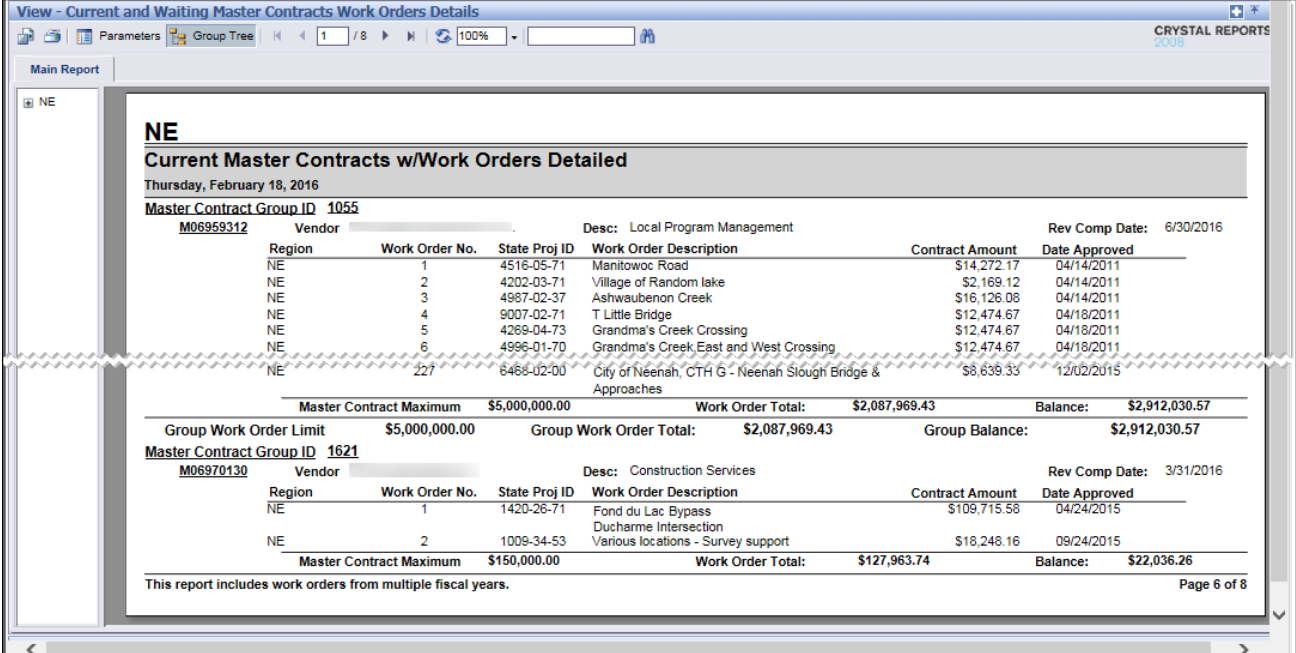


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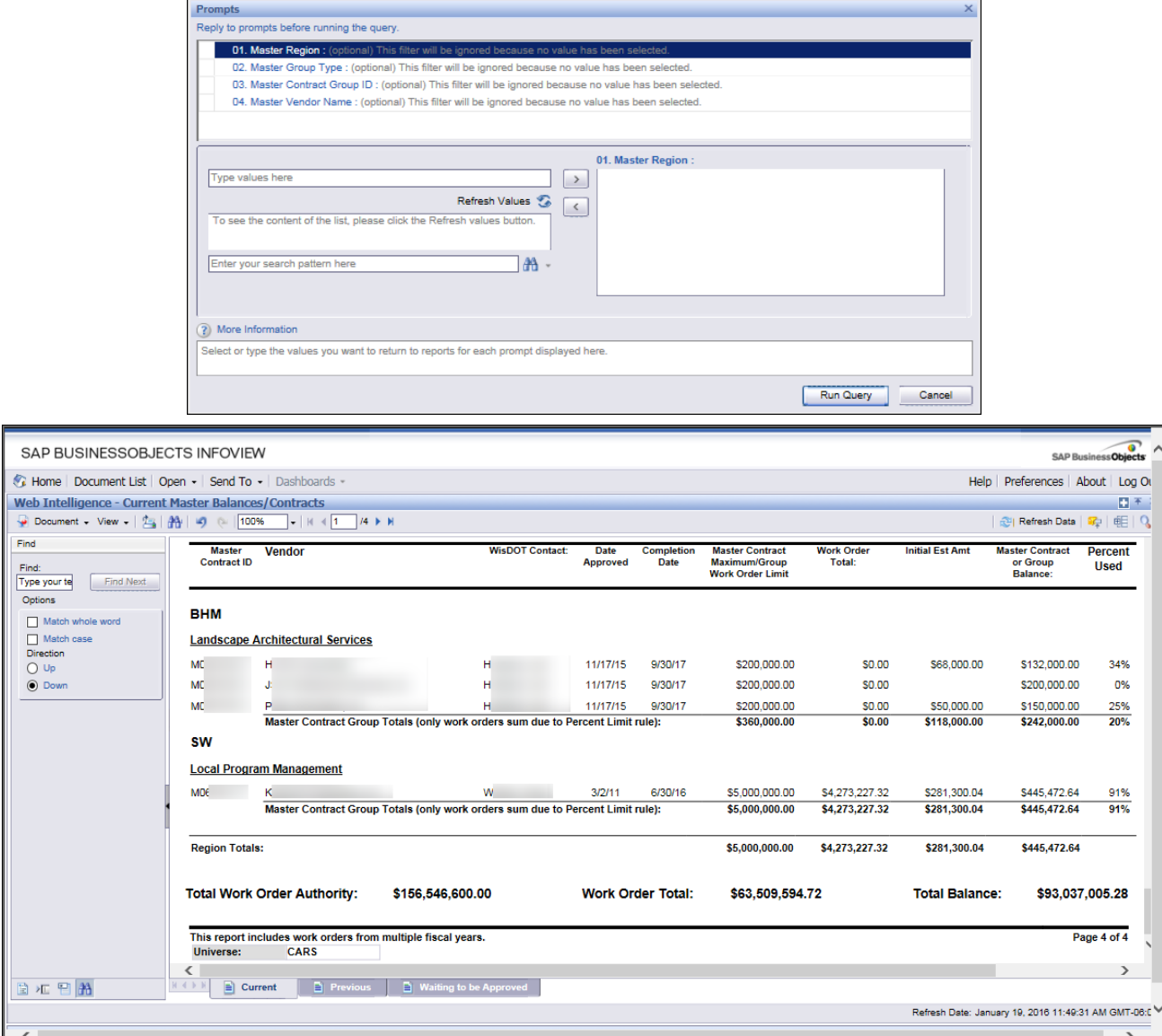


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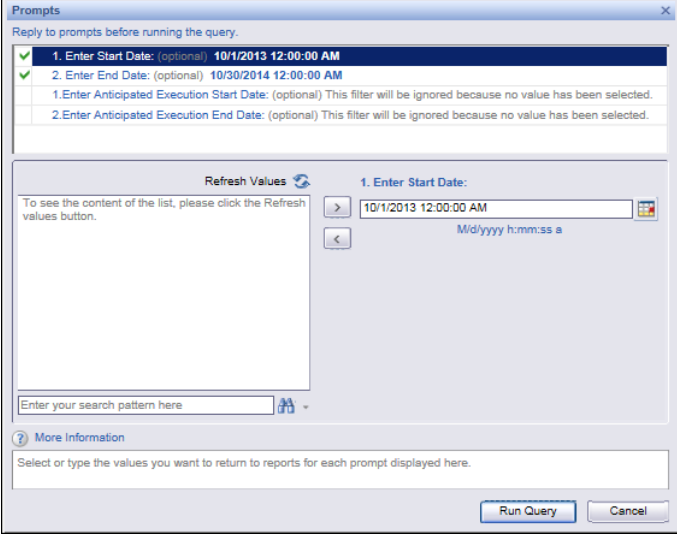
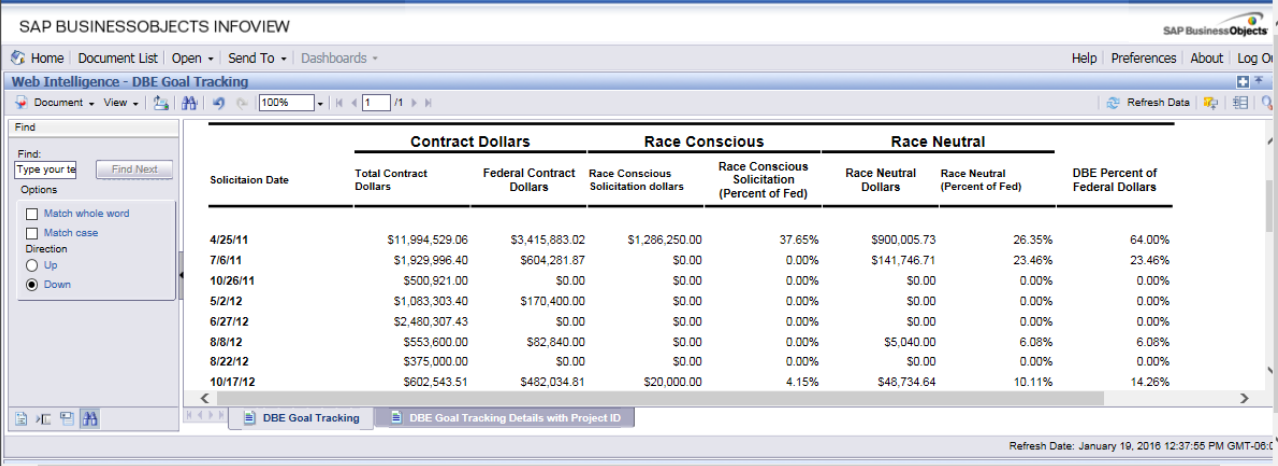


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Current and Waiting Master Contracts Work Orders Details	<p>Lists current master contracts and work order details by region. A cost summary is shown on the last page of the report.</p> <p>Prompt - required:</p> <ul style="list-style-type: none"> • Region/Bureau 	  <p>NE Current Master Contracts w/Work Orders Detailed Thursday, February 18, 2016 Master Contract Group ID 1055</p> <table border="1"> <thead> <tr> <th>Region</th> <th>Work Order No.</th> <th>State Proj ID</th> <th>Work Order Description</th> <th>Contract Amount</th> <th>Date Approved</th> </tr> </thead> <tbody> <tr> <td>NE</td> <td>1</td> <td>4516-05-71</td> <td>Manitowoc Road</td> <td>\$14,272.17</td> <td>04/14/2011</td> </tr> <tr> <td>NE</td> <td>2</td> <td>4202-03-71</td> <td>Village of Random Lake</td> <td>\$2,169.12</td> <td>04/14/2011</td> </tr> <tr> <td>NE</td> <td>3</td> <td>4987-02-37</td> <td>Ashwaubenon Creek</td> <td>\$16,126.08</td> <td>04/14/2011</td> </tr> <tr> <td>NE</td> <td>4</td> <td>9007-02-71</td> <td>T Little Bridge</td> <td>\$12,474.67</td> <td>04/18/2011</td> </tr> <tr> <td>NE</td> <td>5</td> <td>4269-04-73</td> <td>Grandma's Creek Crossing</td> <td>\$12,474.67</td> <td>04/18/2011</td> </tr> <tr> <td>NE</td> <td>6</td> <td>4996-01-70</td> <td>Grandma's Creek East and West Crossing</td> <td>\$12,474.67</td> <td>04/18/2011</td> </tr> <tr> <td>NE</td> <td>227</td> <td>6464-02-00</td> <td>City of Neenah, CTH G - Neenah Slough Bridge & Approaches</td> <td>\$8,639.33</td> <td>12/02/2015</td> </tr> <tr> <td colspan="2">Master Contract Maximum</td> <td>\$5,000,000.00</td> <td>Work Order Total:</td> <td>\$2,087,969.43</td> <td>Balance: \$2,912,030.57</td> </tr> <tr> <td colspan="2">Group Work Order Limit</td> <td>\$5,000,000.00</td> <td>Group Work Order Total:</td> <td>\$2,087,969.43</td> <td>Group Balance: \$2,912,030.57</td> </tr> </tbody> </table> <p>Master Contract Group ID 1621</p> <table border="1"> <thead> <tr> <th>Region</th> <th>Work Order No.</th> <th>State Proj ID</th> <th>Work Order Description</th> <th>Contract Amount</th> <th>Date Approved</th> </tr> </thead> <tbody> <tr> <td>NE</td> <td>1</td> <td>1420-26-71</td> <td>Fond du Lac Bypass</td> <td>\$109,715.58</td> <td>04/24/2015</td> </tr> <tr> <td>NE</td> <td>2</td> <td>1009-34-53</td> <td>DuCharme Intersection Various locations - Survey support</td> <td>\$18,248.16</td> <td>09/24/2015</td> </tr> <tr> <td colspan="2">Master Contract Maximum</td> <td>\$150,000.00</td> <td>Work Order Total:</td> <td>\$127,963.74</td> <td>Balance: \$22,036.26</td> </tr> </tbody> </table> <p>This report includes work orders from multiple fiscal years. Page 6 of 8</p>	Region	Work Order No.	State Proj ID	Work Order Description	Contract Amount	Date Approved	NE	1	4516-05-71	Manitowoc Road	\$14,272.17	04/14/2011	NE	2	4202-03-71	Village of Random Lake	\$2,169.12	04/14/2011	NE	3	4987-02-37	Ashwaubenon Creek	\$16,126.08	04/14/2011	NE	4	9007-02-71	T Little Bridge	\$12,474.67	04/18/2011	NE	5	4269-04-73	Grandma's Creek Crossing	\$12,474.67	04/18/2011	NE	6	4996-01-70	Grandma's Creek East and West Crossing	\$12,474.67	04/18/2011	NE	227	6464-02-00	City of Neenah, CTH G - Neenah Slough Bridge & Approaches	\$8,639.33	12/02/2015	Master Contract Maximum		\$5,000,000.00	Work Order Total:	\$2,087,969.43	Balance: \$2,912,030.57	Group Work Order Limit		\$5,000,000.00	Group Work Order Total:	\$2,087,969.43	Group Balance: \$2,912,030.57	Region	Work Order No.	State Proj ID	Work Order Description	Contract Amount	Date Approved	NE	1	1420-26-71	Fond du Lac Bypass	\$109,715.58	04/24/2015	NE	2	1009-34-53	DuCharme Intersection Various locations - Survey support	\$18,248.16	09/24/2015	Master Contract Maximum		\$150,000.00	Work Order Total:	\$127,963.74	Balance: \$22,036.26
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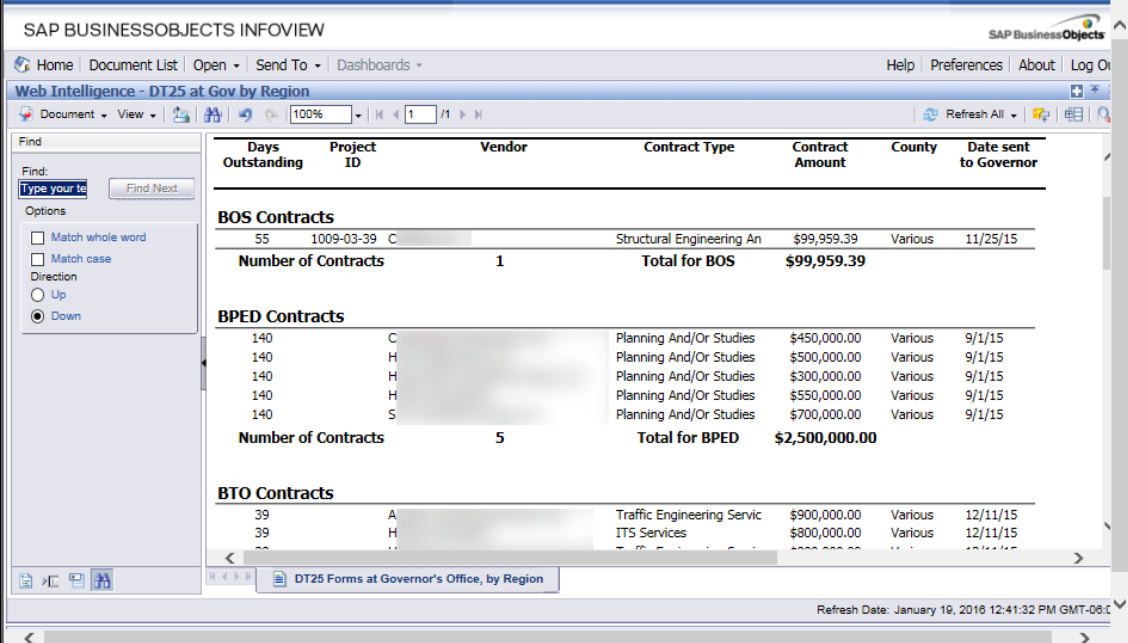
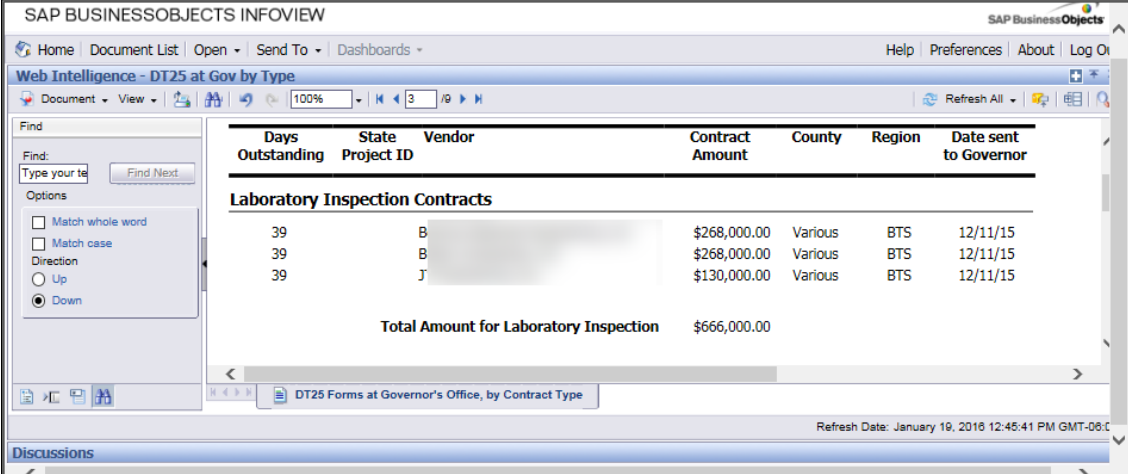


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<p>Current Master Balances/Contracts</p>	<p>Lists current master contracts, firms, WisDOT contact, approval and completion date and work order cost totals by region. 3 tabs show information by current or previous master contracts, or masters waiting to be approved.</p> <p>Prompts - all optional:</p> <ul style="list-style-type: none"> • Region • Group Type • Master Group ID • Vendor Name 	 <p>The image shows two screenshots from SAP BusinessObjects InfoView. The top screenshot is a 'Prompts' dialog box with four optional filters: 01. Master Region, 02. Master Group Type, 03. Master Contract Group ID, and 04. Master Vendor Name. The bottom screenshot is a report titled 'Web Intelligence - Current Master Balances/Contracts' showing a table of contract data.</p> <table border="1"> <thead> <tr> <th>Master Contract ID</th> <th>Vendor</th> <th>WisDOT Contact</th> <th>Date Approved</th> <th>Completion Date</th> <th>Master Contract Maximum/Group Work Order Limit</th> <th>Work Order Total:</th> <th>Initial Est Amt</th> <th>Master Contract or Group Balance:</th> <th>Percent Used</th> </tr> </thead> <tbody> <tr> <td colspan="10">BHM</td> </tr> <tr> <td colspan="10">Landscape Architectural Services</td> </tr> <tr> <td>MC</td> <td>H</td> <td>H</td> <td>11/17/15</td> <td>9/30/17</td> <td>\$200,000.00</td> <td>\$0.00</td> <td>\$68,000.00</td> <td>\$132,000.00</td> <td>34%</td> </tr> <tr> <td>MC</td> <td>J</td> <td>H</td> <td>11/17/15</td> <td>9/30/17</td> <td>\$200,000.00</td> <td>\$0.00</td> <td>\$200,000.00</td> <td>\$200,000.00</td> <td>0%</td> </tr> <tr> <td>MC</td> <td>P</td> <td>H</td> <td>11/17/15</td> <td>9/30/17</td> <td>\$200,000.00</td> <td>\$0.00</td> <td>\$50,000.00</td> <td>\$150,000.00</td> <td>25%</td> </tr> <tr> <td colspan="5">Master Contract Group Totals (only work orders sum due to Percent Limit rule):</td> <td>\$360,000.00</td> <td>\$0.00</td> <td>\$118,000.00</td> <td>\$242,000.00</td> <td>20%</td> </tr> <tr> <td colspan="10">SW</td> </tr> <tr> <td colspan="10">Local Program Management</td> </tr> <tr> <td>MD</td> <td>K</td> <td>W</td> <td>3/2/11</td> <td>6/30/16</td> <td>\$5,000,000.00</td> <td>\$4,273,227.32</td> <td>\$281,300.04</td> <td>\$445,472.64</td> <td>91%</td> </tr> <tr> <td colspan="5">Master Contract Group Totals (only work orders sum due to Percent Limit rule):</td> <td>\$5,000,000.00</td> <td>\$4,273,227.32</td> <td>\$281,300.04</td> <td>\$445,472.64</td> <td>91%</td> </tr> <tr> <td colspan="5">Region Totals:</td> <td>\$5,000,000.00</td> <td>\$4,273,227.32</td> <td>\$281,300.04</td> <td>\$445,472.64</td> <td></td> </tr> <tr> <td colspan="6">Total Work Order Authority:</td> <td>\$156,546,600.00</td> <td colspan="2">Work Order Total:</td> <td>\$63,509,594.72</td> </tr> <tr> <td colspan="6"></td> <td></td> <td colspan="2">Total Balance:</td> <td>\$93,037,005.28</td> </tr> </tbody> </table>	Master Contract ID	Vendor	WisDOT Contact	Date Approved	Completion Date	Master Contract Maximum/Group Work Order Limit	Work Order Total:	Initial Est Amt	Master Contract or Group Balance:	Percent Used	BHM										Landscape Architectural Services										MC	H	H	11/17/15	9/30/17	\$200,000.00	\$0.00	\$68,000.00	\$132,000.00	34%	MC	J	H	11/17/15	9/30/17	\$200,000.00	\$0.00	\$200,000.00	\$200,000.00	0%	MC	P	H	11/17/15	9/30/17	\$200,000.00	\$0.00	\$50,000.00	\$150,000.00	25%	Master Contract Group Totals (only work orders sum due to Percent Limit rule):					\$360,000.00	\$0.00	\$118,000.00	\$242,000.00	20%	SW										Local Program Management										MD	K	W	3/2/11	6/30/16	\$5,000,000.00	\$4,273,227.32	\$281,300.04	\$445,472.64	91%	Master Contract Group Totals (only work orders sum due to Percent Limit rule):					\$5,000,000.00	\$4,273,227.32	\$281,300.04	\$445,472.64	91%	Region Totals:					\$5,000,000.00	\$4,273,227.32	\$281,300.04	\$445,472.64		Total Work Order Authority:						\$156,546,600.00	Work Order Total:		\$63,509,594.72								Total Balance:		\$93,037,005.28
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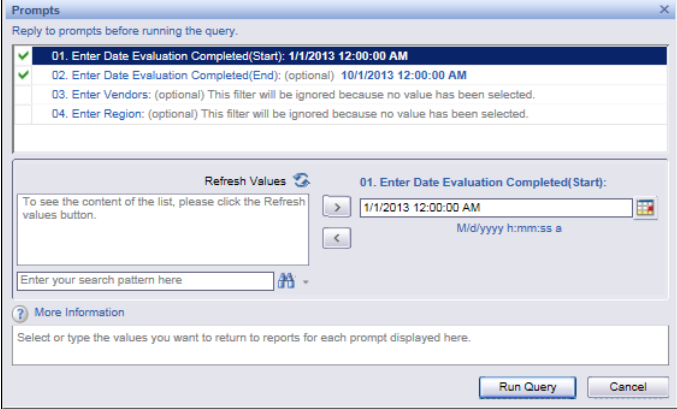
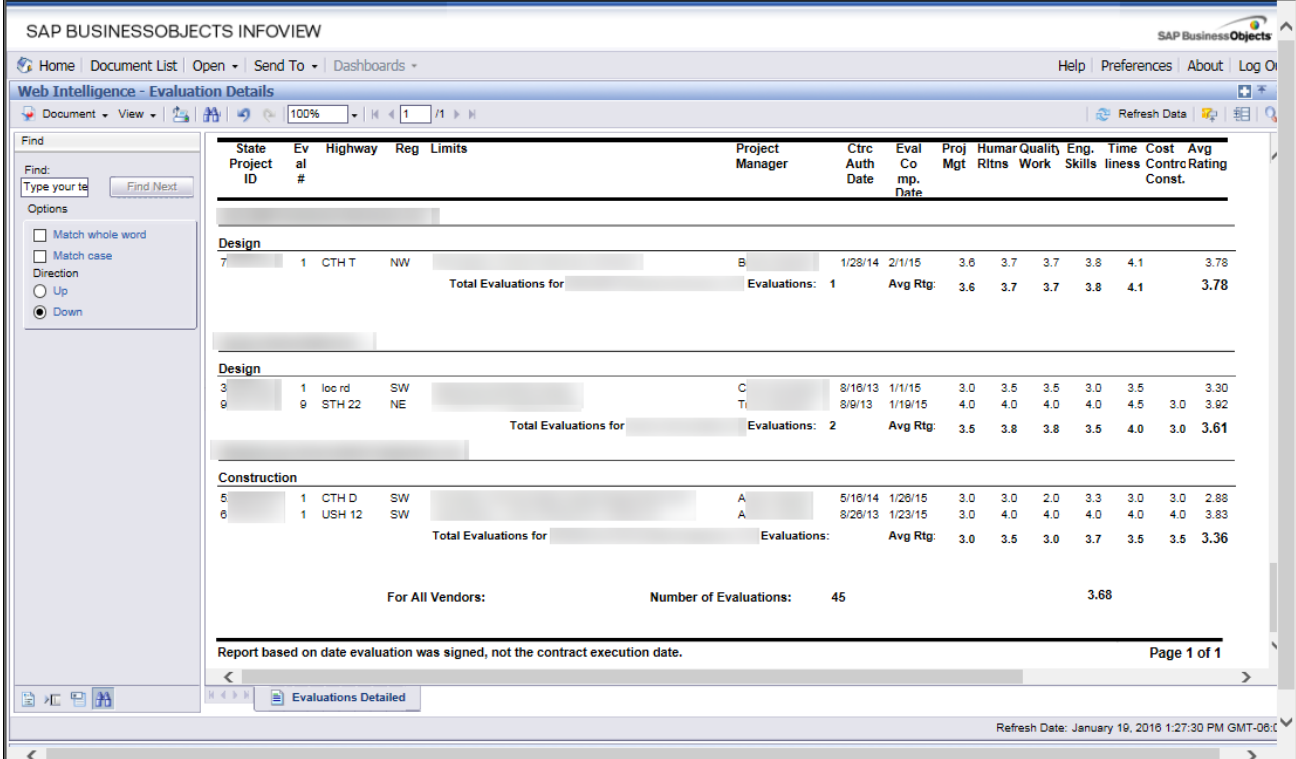


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<p>DBE Goal Tracking</p>	<p>Lists total authorized contract dollars, federal contract dollars, race-conscious and race-neutral dollars by solicitation date. Each category is summarized at the end of the DBE Goal Tracking report.</p> <p>The first report tab is the DBE Goal Tracking report and the second lists details by project ID.</p> <p>Prompts - all optional:</p> <ul style="list-style-type: none"> • Start Date - start date of the date range • End Date - end date of the date range - end date of the date range • Anticipated Execution Start Date - start date of the date range • Anticipated Execution End Date- end date of the date range 	  <table border="1" data-bbox="913 901 1974 1161"> <thead> <tr> <th rowspan="2">Solicitation Date</th> <th colspan="2">Contract Dollars</th> <th colspan="2">Race Conscious</th> <th colspan="2">Race Neutral</th> <th rowspan="2">DBE Percent of Federal Dollars</th> </tr> <tr> <th>Total Contract Dollars</th> <th>Federal Contract Dollars</th> <th>Race Conscious Solicitation dollars</th> <th>Race Conscious Solicitation (Percent of Fed)</th> <th>Race Neutral Dollars</th> <th>Race Neutral (Percent of Fed)</th> </tr> </thead> <tbody> <tr> <td>4/25/11</td> <td>\$11,994,529.06</td> <td>\$3,415,883.02</td> <td>\$1,286,250.00</td> <td>37.65%</td> <td>\$900,005.73</td> <td>26.35%</td> <td>64.00%</td> </tr> <tr> <td>7/6/11</td> <td>\$1,929,996.40</td> <td>\$604,281.87</td> <td>\$0.00</td> <td>0.00%</td> <td>\$141,746.71</td> <td>23.46%</td> <td>23.46%</td> </tr> <tr> <td>10/26/11</td> <td>\$500,921.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>0.00%</td> <td>\$0.00</td> <td>0.00%</td> <td>0.00%</td> </tr> <tr> <td>5/2/12</td> <td>\$1,083,303.40</td> <td>\$170,400.00</td> <td>\$0.00</td> <td>0.00%</td> <td>\$0.00</td> <td>0.00%</td> <td>0.00%</td> </tr> <tr> <td>6/27/12</td> <td>\$2,480,307.43</td> <td>\$0.00</td> <td>\$0.00</td> <td>0.00%</td> <td>\$0.00</td> <td>0.00%</td> <td>0.00%</td> </tr> <tr> <td>8/8/12</td> <td>\$553,600.00</td> <td>\$82,840.00</td> <td>\$0.00</td> <td>0.00%</td> <td>\$5,040.00</td> <td>6.08%</td> <td>6.08%</td> </tr> <tr> <td>8/22/12</td> <td>\$375,000.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>0.00%</td> <td>\$0.00</td> <td>0.00%</td> <td>0.00%</td> </tr> <tr> <td>10/17/12</td> <td>\$602,543.51</td> <td>\$482,034.81</td> <td>\$20,000.00</td> <td>4.15%</td> <td>\$48,734.64</td> <td>10.11%</td> <td>14.26%</td> </tr> </tbody> </table>	Solicitation Date	Contract Dollars		Race Conscious		Race Neutral		DBE Percent of Federal Dollars	Total Contract Dollars	Federal Contract Dollars	Race Conscious Solicitation dollars	Race Conscious Solicitation (Percent of Fed)	Race Neutral Dollars	Race Neutral (Percent of Fed)	4/25/11	\$11,994,529.06	\$3,415,883.02	\$1,286,250.00	37.65%	\$900,005.73	26.35%	64.00%	7/6/11	\$1,929,996.40	\$604,281.87	\$0.00	0.00%	\$141,746.71	23.46%	23.46%	10/26/11	\$500,921.00	\$0.00	\$0.00	0.00%	\$0.00	0.00%	0.00%	5/2/12	\$1,083,303.40	\$170,400.00	\$0.00	0.00%	\$0.00	0.00%	0.00%	6/27/12	\$2,480,307.43	\$0.00	\$0.00	0.00%	\$0.00	0.00%	0.00%	8/8/12	\$553,600.00	\$82,840.00	\$0.00	0.00%	\$5,040.00	6.08%	6.08%	8/22/12	\$375,000.00	\$0.00	\$0.00	0.00%	\$0.00	0.00%	0.00%	10/17/12	\$602,543.51	\$482,034.81	\$20,000.00	4.15%	\$48,734.64	10.11%	14.26%
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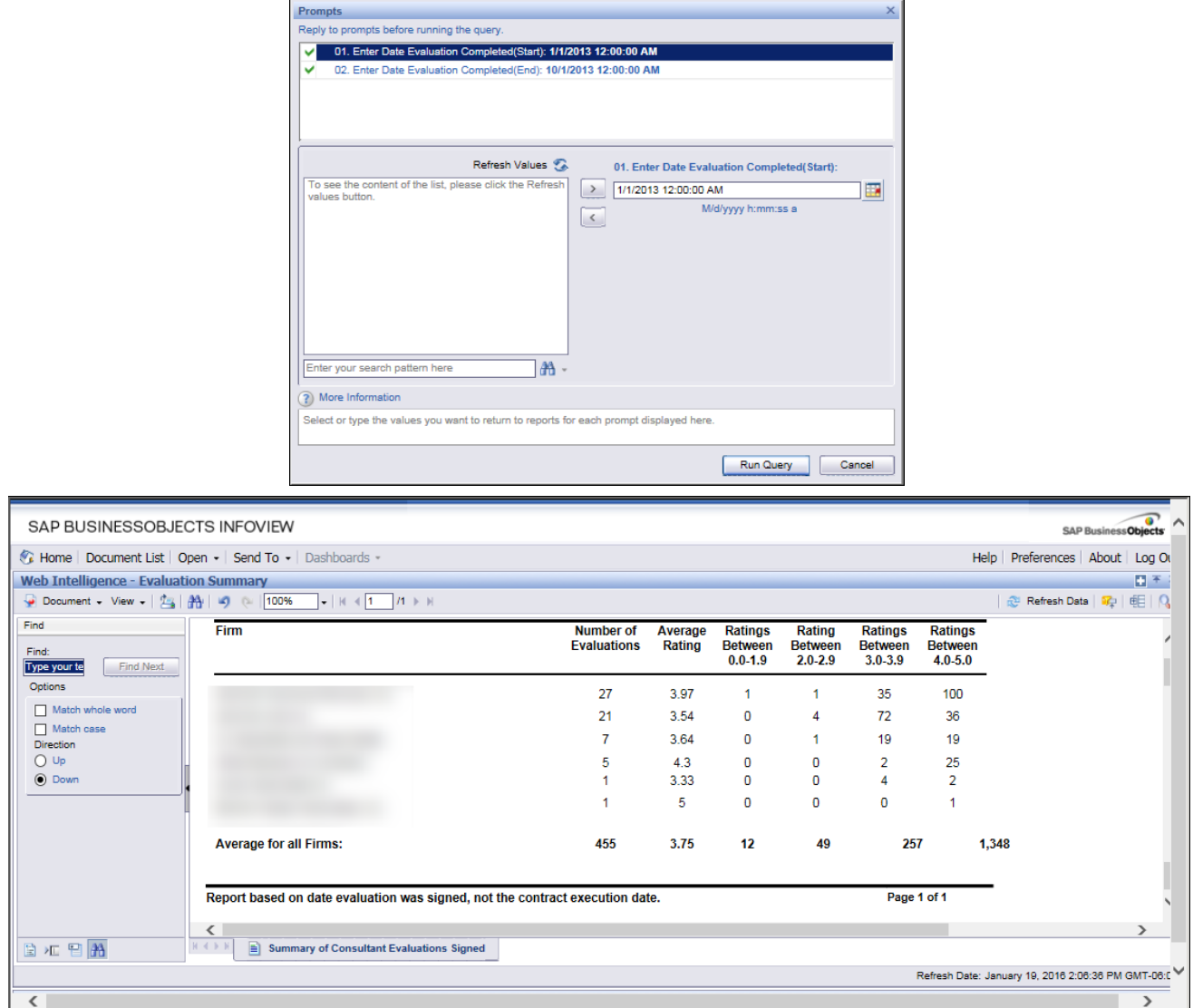


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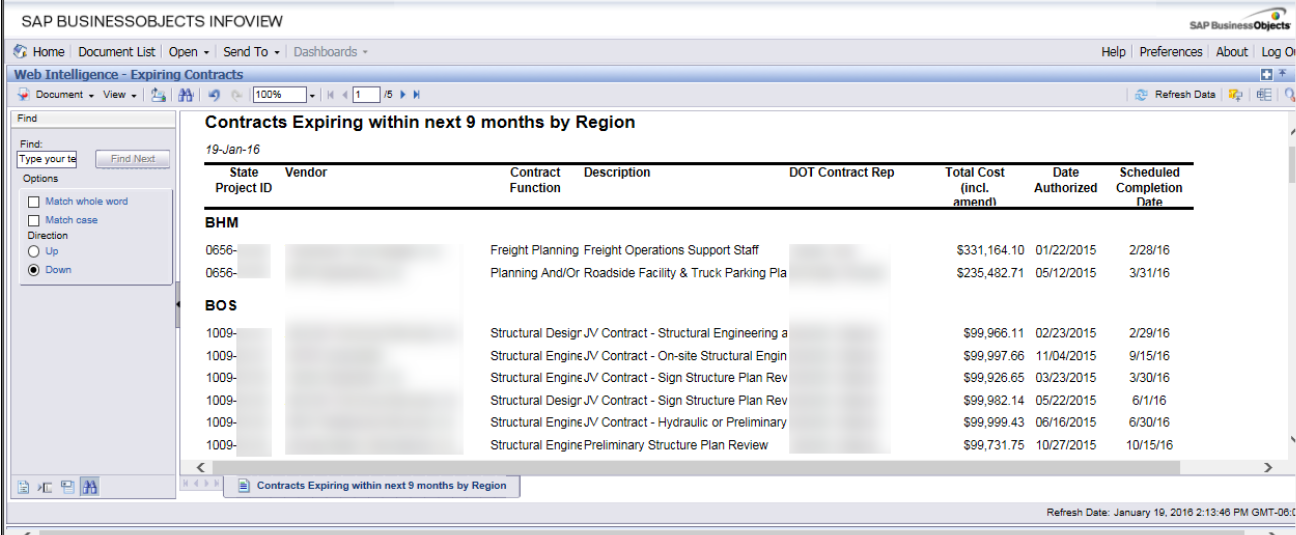


Report	Description	Prompt and Results Dialog Box Images
<p>Evaluation Details</p>	<p>Lists evaluation results by function and project grouped by vendor name. The number of evaluations and the average rating are reported.</p> <p>Prompts - Start date is required, all others optional:</p> <ul style="list-style-type: none"> • Start Date - start date of the date range • End Date - end date of the date range • Vendor • Region 	  <p>The screenshot shows a table of evaluation results. The table has the following columns: State, Project ID, Highway, Region, Limits, Project Manager, Ctrc Auth Date, Eval Co mp. Date, Proj Mgt, Human Quality, Eng. Work, Skills, Time Lines, Cost, and Avg Rating. The data is grouped by project type: Design and Construction. For Design projects, there are 1 and 9 evaluations respectively. For Construction projects, there are 1 and 1 evaluation respectively. A summary row shows 'For All Vendors' with a total of 45 evaluations and an average rating of 3.68.</p>

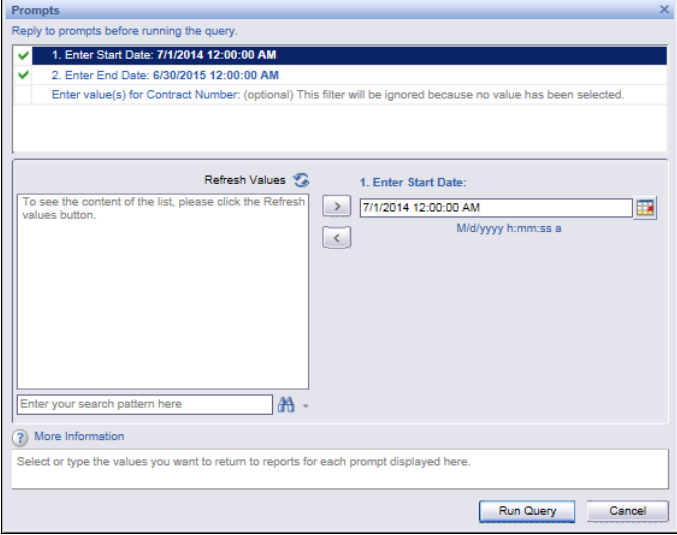


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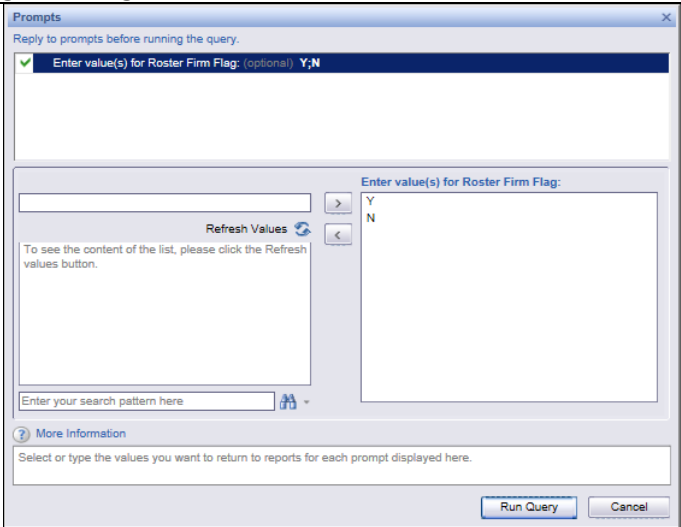


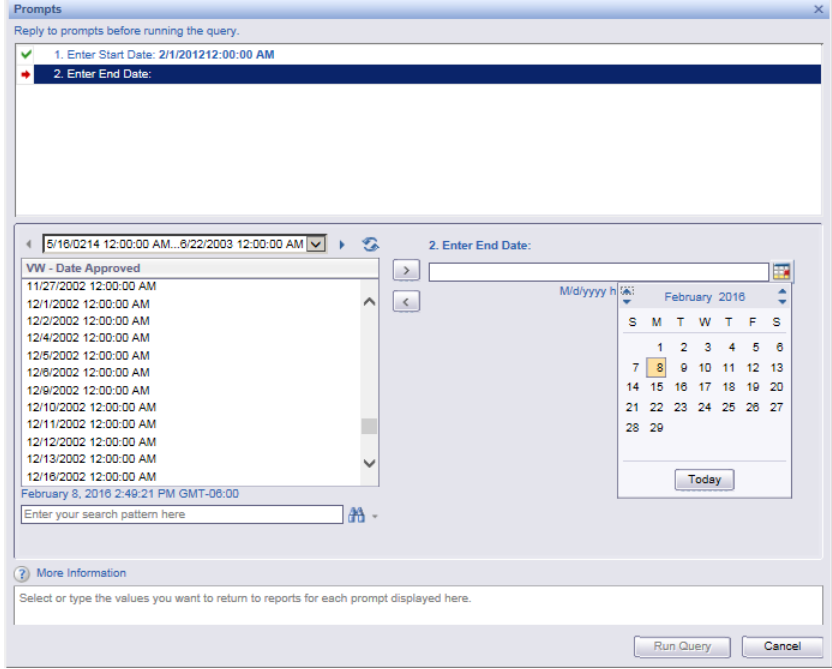
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1009-		Structural Engine	JV Contract - Hydraulic or Preliminary		\$99,999.43	06/16/2015	6/30/16																																																																																			
1009-		Structural Engine	Preliminary Structure Plan Review		\$99,731.75	10/27/2015	10/15/16																																																																																			



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FHWA Uniform Report of DBEs Awards	<p>Summarizes federal dollars awarded to prime and subcontracting DBE firms based on ethnic groups. Standard Federal Highway Administration report.</p> <p>Prompts: - start and end dates are required; contract number is optional.</p> <ul style="list-style-type: none"> • Start Date - start date of the date range • End Date - end date of the date range • Contract Number 	 <div data-bbox="751 764 1955 1429"> <h3 style="text-align: center;">FHWA Uniform Report of DBE Awards Between 07/01/2014 and 12/30/2014</h3> <p style="text-align: center;">Tuesday, January 19, 2016</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>Total Federal Dollars</th> <th>Total Number</th> <th>Total to DBEs</th> <th>Total to DBEs (number)</th> <th>Total to DBEs/ Race Conscious (Dollars)</th> <th>Total to DBEs/ Race Conscious (number)</th> <th>Total to DBEs/ Race Neutral (dollars)</th> <th>Total to DBEs/ Race Neutral (number)</th> <th>Percentage of total dollars to DBEs</th> </tr> </thead> <tbody> <tr> <td>Primes:</td> <td>\$14,865,755</td> <td>391</td> <td>\$1,545,602</td> <td>47</td> <td>-</td> <td>0</td> <td>\$1,545,602</td> <td>47</td> <td>10.40%</td> </tr> <tr> <td>Subs:</td> <td>\$14,362,419</td> <td>238</td> <td>\$4,332,940</td> <td>43</td> <td>\$2,067,490</td> <td>20</td> <td>\$2,265,450</td> <td>23</td> <td>30.17%</td> </tr> <tr> <td>Total:</td> <td>\$29,228,174</td> <td>629</td> <td>\$5,878,542</td> <td>90</td> <td>\$2,067,490</td> <td>20</td> <td>\$3,811,052</td> <td>70</td> <td>20.11%</td> </tr> </tbody> </table> <p style="text-align: center;">Race Conscious Pct: 7.07% Race Neutral Pct: 13.04%</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th></th> <th>Asian Pacific American</th> <th>Asian Pacific Female</th> <th>Asian Pacific Male</th> <th>Black American</th> <th>Black Female</th> <th>Black Male</th> <th>Hispanic American</th> <th>Hispanic Male</th> <th>Native American</th> </tr> </thead> <tbody> <tr> <td>Number</td> <td></td> <td>3</td> <td>4</td> <td></td> <td></td> <td>11</td> <td></td> <td>5</td> <td></td> </tr> <tr> <td>Dollars</td> <td></td> <td>\$74,232.36</td> <td>\$2,030,050.21</td> <td></td> <td></td> <td>\$964,287.63</td> <td></td> <td>\$122,865.45</td> <td></td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th></th> <th>Native American Male</th> <th>Non-Minority Female</th> <th>Non-Minority Women</th> <th>Sub-Continent Asian American</th> <th>Sub-Continent Asian Female</th> <th>Sub-Continent Asian Male</th> <th>Others</th> <th>Totals for this Period</th> </tr> </thead> <tbody> <tr> <td>Number</td> <td>1</td> <td>63</td> <td></td> <td></td> <td></td> <td>2</td> <td></td> <td>104</td> </tr> <tr> <td>Dollars</td> <td>\$8,998.53</td> <td>\$2,865,316.03</td> <td></td> <td></td> <td></td> <td>\$118,421.94</td> <td></td> <td>\$5,878,541.84</td> </tr> </tbody> </table> <p style="text-align: right; font-size: small;">Refresh Date: January 19, 2016 2:45:24 PM GMT-06</p> </div>		Total Federal Dollars	Total Number	Total to DBEs	Total to DBEs (number)	Total to DBEs/ Race Conscious (Dollars)	Total to DBEs/ Race Conscious (number)	Total to DBEs/ Race Neutral (dollars)	Total to DBEs/ Race Neutral (number)	Percentage of total dollars to DBEs	Primes:	\$14,865,755	391	\$1,545,602	47	-	0	\$1,545,602	47	10.40%	Subs:	\$14,362,419	238	\$4,332,940	43	\$2,067,490	20	\$2,265,450	23	30.17%	Total:	\$29,228,174	629	\$5,878,542	90	\$2,067,490	20	\$3,811,052	70	20.11%		Asian Pacific American	Asian Pacific Female	Asian Pacific Male	Black American	Black Female	Black Male	Hispanic American	Hispanic Male	Native American	Number		3	4			11		5		Dollars		\$74,232.36	\$2,030,050.21			\$964,287.63		\$122,865.45			Native American Male	Non-Minority Female	Non-Minority Women	Sub-Continent Asian American	Sub-Continent Asian Female	Sub-Continent Asian Male	Others	Totals for this Period	Number	1	63				2		104	Dollars	\$8,998.53	\$2,865,316.03				\$118,421.94		\$5,878,541.84
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<u>Report</u>	<u>Description</u>	<u>Prompt and Results Dialog Box Images</u>
Firm Email Distribution List	<p>Lists the contact email addresses for vendor firms. The email list for rostered and non-rostered firms is permanently stored in the Public Folders\CARS\Documentat ion folder.</p> <p>Prompt - optional</p> <ul style="list-style-type: none"> • Roster Firm Flag - Enter “N” as a second value or remove the “Y” (no parameters entered) to generate a list of email addresses for non-rostered and rostered firms. Specifying “Y” generates a list of email contacts for rostered firms only. “Y” is the default. 	 <p>Note: Report results are not displayed to protect the privacy of the email address owners.</p>

Report	Description	Prompt and Results Dialog Box Images																																																																						
Fixed Fee by Fixed Fee Pct (Function)	<p>Lists ranges of fixed fees as percent of total contract/work order costs. Report is segregated into construction, other, and all contracts</p> <p>Prompts - required:</p> <ul style="list-style-type: none"> • Start Date - start date of the date range • End Date - end date of the date range 	 <p>The screenshot shows a 'Prompts' dialog box with two prompts: '1. Enter Start Date: 2/1/2012 12:00:00 AM' and '2. Enter End Date:'. Below the prompts is a list of dates under the heading 'VW - Date Approved', ranging from 11/27/2002 to 12/18/2002. To the right of the list is a calendar for February 2016, with the 8th selected. At the bottom of the dialog are 'Run Query' and 'Cancel' buttons.</p> <table border="1" data-bbox="926 902 1787 1318"> <thead> <tr> <th colspan="5">Fixed Fee by Fixed Fee Pct. for Contracts/Work Orders Between 02/01/2012 and 01/31/2013</th> </tr> <tr> <td>08-Feb-16</td> <td colspan="3">All Projects</td> <td>All Regions</td> </tr> <tr> <th></th> <th>Number of Contracts/Work Orders</th> <th>Total Prime Vendor Costs</th> <th>Pct. Contracts/Work Orders</th> <th>Pct. Contract/WO Cost</th> </tr> </thead> <tbody> <tr> <td colspan="5">Construction Contracts</td> </tr> <tr> <td>Less than 6%</td> <td>2</td> <td>\$22,607.04</td> <td>0.77%</td> <td>0.04%</td> </tr> <tr> <td>6 to 6.4%</td> <td>4</td> <td>\$386,367.20</td> <td>1.54%</td> <td>0.62%</td> </tr> <tr> <td>6.5 to 6.9%</td> <td>22</td> <td>\$1,913,334.84</td> <td>8.49%</td> <td>3.07%</td> </tr> <tr> <td>7 to 7.4%</td> <td>187</td> <td>\$39,127,218.45</td> <td>72.20%</td> <td>62.85%</td> </tr> <tr> <td>7.5 to 7.9%</td> <td>12</td> <td>\$8,613,443.70</td> <td>4.63%</td> <td>13.84%</td> </tr> <tr> <td>8 to 8.4%</td> <td>30</td> <td>\$12,095,810.31</td> <td>11.58%</td> <td>19.43%</td> </tr> <tr> <td>9 to 9.4%</td> <td>1</td> <td>\$49,900.00</td> <td>0.39%</td> <td>0.08%</td> </tr> <tr> <td>10 to 10.4%</td> <td>1</td> <td>\$49,536.38</td> <td>0.39%</td> <td>0.08%</td> </tr> <tr> <td></td> <td>259</td> <td>\$62,258,217.92</td> <td>100.00%</td> <td>100.00%</td> </tr> <tr> <td colspan="5">Simple Average Fixed Fee for Contracts: 7.09% Weighted Average Fixed Fee for Contracts: 7.27%</td> </tr> </tbody> </table>	Fixed Fee by Fixed Fee Pct. for Contracts/Work Orders Between 02/01/2012 and 01/31/2013					08-Feb-16	All Projects			All Regions		Number of Contracts/Work Orders	Total Prime Vendor Costs	Pct. Contracts/Work Orders	Pct. Contract/WO Cost	Construction Contracts					Less than 6%	2	\$22,607.04	0.77%	0.04%	6 to 6.4%	4	\$386,367.20	1.54%	0.62%	6.5 to 6.9%	22	\$1,913,334.84	8.49%	3.07%	7 to 7.4%	187	\$39,127,218.45	72.20%	62.85%	7.5 to 7.9%	12	\$8,613,443.70	4.63%	13.84%	8 to 8.4%	30	\$12,095,810.31	11.58%	19.43%	9 to 9.4%	1	\$49,900.00	0.39%	0.08%	10 to 10.4%	1	\$49,536.38	0.39%	0.08%		259	\$62,258,217.92	100.00%	100.00%	Simple Average Fixed Fee for Contracts: 7.09% Weighted Average Fixed Fee for Contracts: 7.27%				
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Governor's Office Report

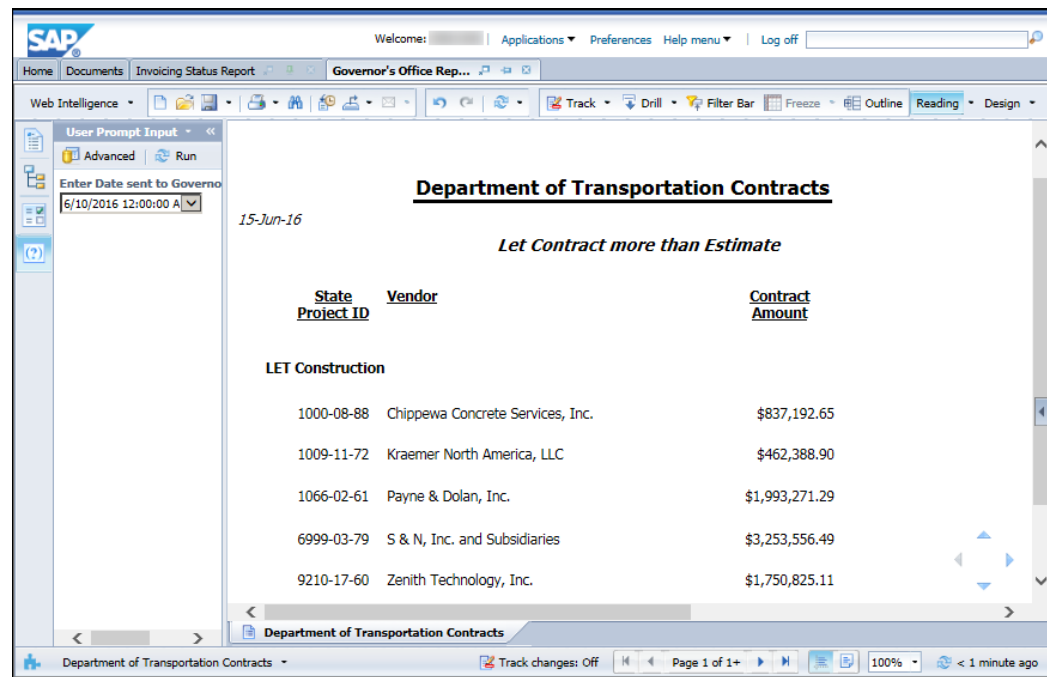
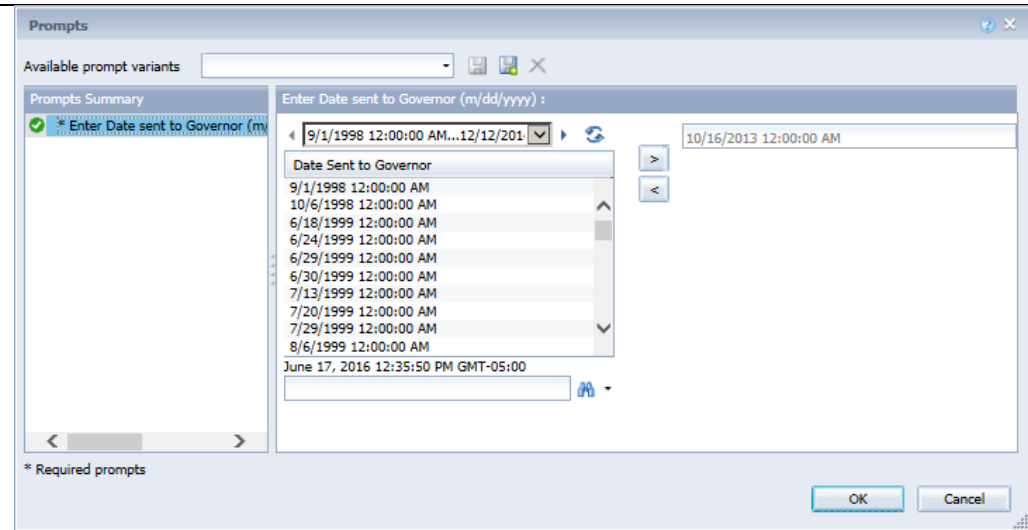
Lists DOT projects sent to the Governor's office on the specified date. Multiple pages are generated to list contracts by state funding percent or other groups:

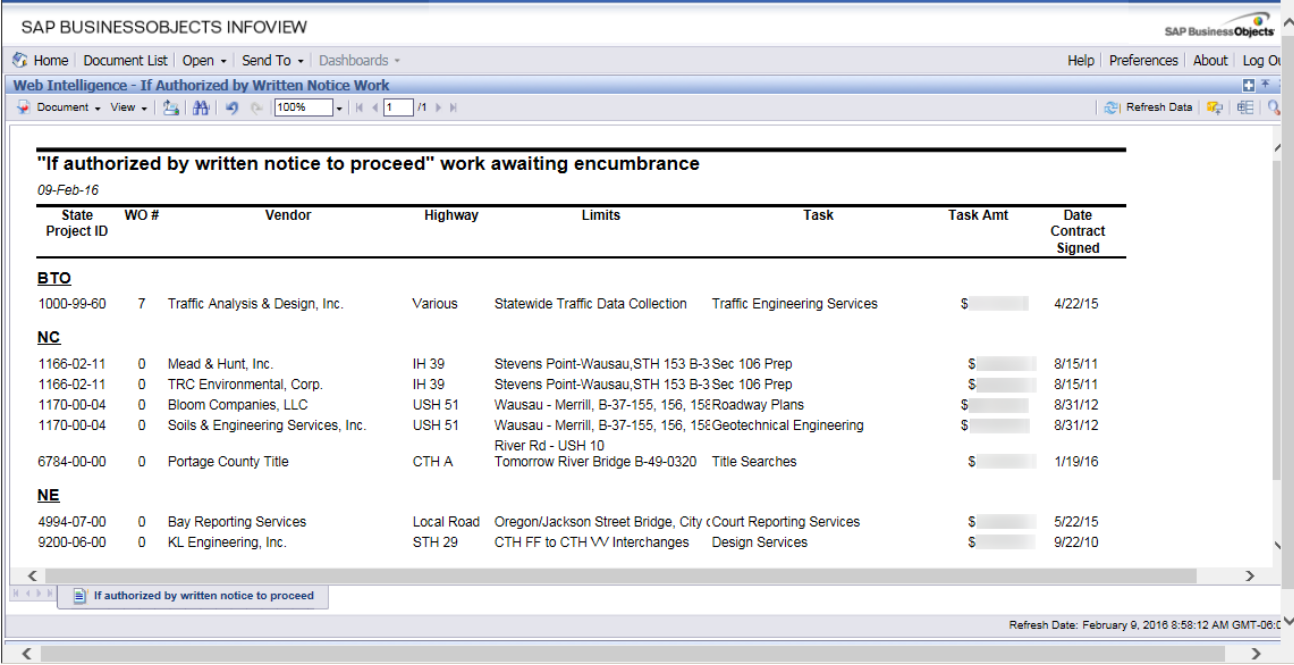
- No State Funding
- State Funding 20% or Less
- State Funding More than 20%
- Let Contract more than Estimate

Project on the report pages are grouped by contract function, such as LET Construction, Local Construction, Construction Services, Design Engineering, Specialty Master Contract, Utility, etc.

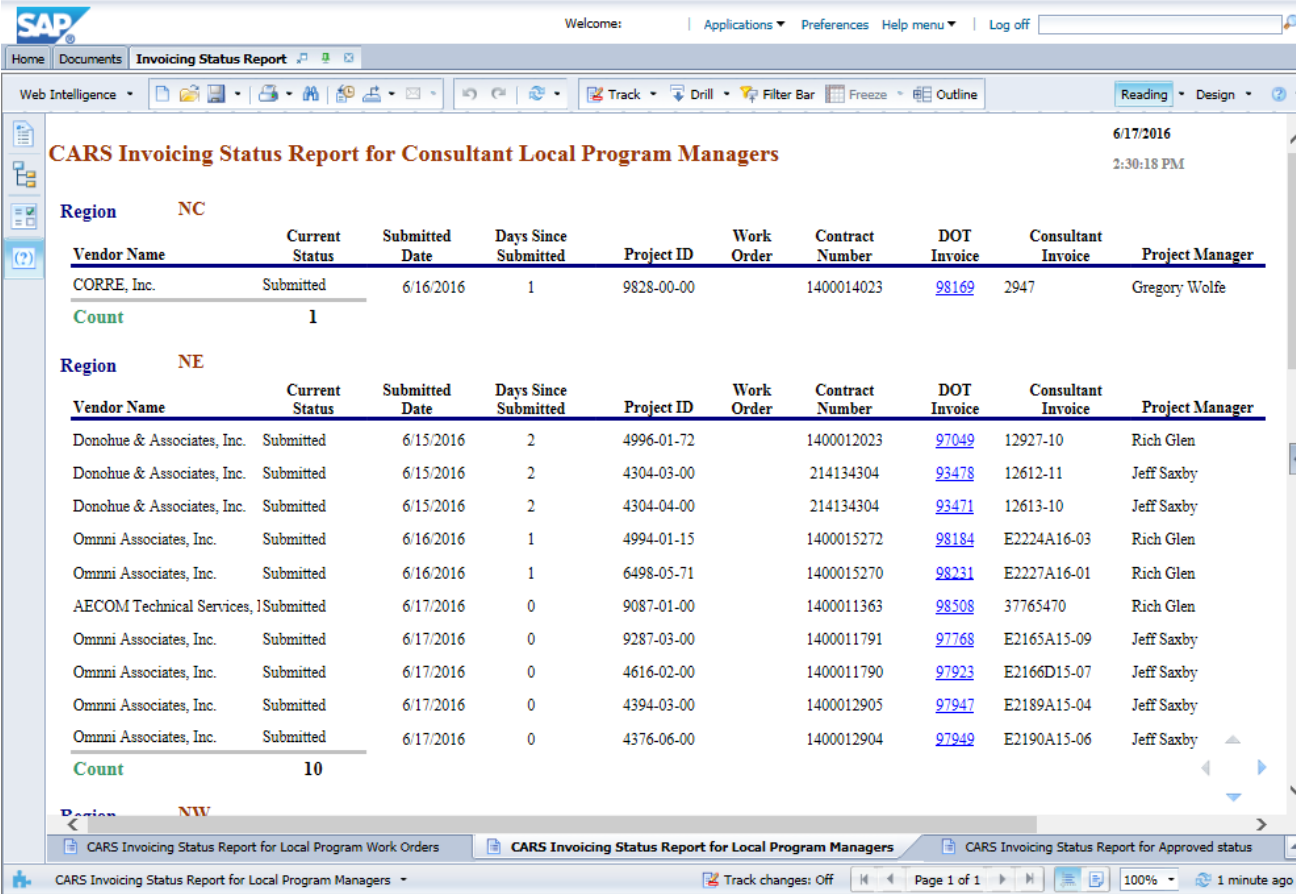
Prompt - required:

- Date sent to Governor. This value is a single date, not a range.



Report	Description	Prompt and Results Dialog Box Images																																																																																																
If Authorized by Written Notice Work	Lists projects, vendor, highway, limits and if authorized amounts awaiting encumbrance. Projects grouped by region and bureau. No prompts.	 <p>SAP BUSINESSOBJECTS INFOVIEW</p> <p>Web Intelligence - If Authorized by Written Notice Work</p> <p>"If authorized by written notice to proceed" work awaiting encumbrance</p> <p>09-Feb-16</p> <table border="1"> <thead> <tr> <th>State Project ID</th> <th>WO #</th> <th>Vendor</th> <th>Highway</th> <th>Limits</th> <th>Task</th> <th>Task Amt</th> <th>Date Contract Signed</th> </tr> </thead> <tbody> <tr> <td colspan="8">BTO</td> </tr> <tr> <td>1000-99-60</td> <td>7</td> <td>Traffic Analysis & Design, Inc.</td> <td>Various</td> <td>Statewide Traffic Data Collection</td> <td>Traffic Engineering Services</td> <td>\$</td> <td>4/22/15</td> </tr> <tr> <td colspan="8">NC</td> </tr> <tr> <td>1166-02-11</td> <td>0</td> <td>Mead & Hunt, Inc.</td> <td>IH 39</td> <td>Stevens Point-Wausau,STH 153 B-3 Sec 106 Prep</td> <td></td> <td>\$</td> <td>8/15/11</td> </tr> <tr> <td>1166-02-11</td> <td>0</td> <td>TRC Environmental, Corp.</td> <td>IH 39</td> <td>Stevens Point-Wausau,STH 153 B-3 Sec 106 Prep</td> <td></td> <td>\$</td> <td>8/15/11</td> </tr> <tr> <td>1170-00-04</td> <td>0</td> <td>Bloom Companies, LLC</td> <td>USH 51</td> <td>Wausau - Merrill, B-37-155, 156, 156</td> <td>Roadway Plans</td> <td>\$</td> <td>8/31/12</td> </tr> <tr> <td>1170-00-04</td> <td>0</td> <td>Soils & Engineering Services, Inc.</td> <td>USH 51</td> <td>Wausau - Merrill, B-37-155, 156, 156</td> <td>Geotechnical Engineering</td> <td>\$</td> <td>8/31/12</td> </tr> <tr> <td>6784-00-00</td> <td>0</td> <td>Portage County Title</td> <td>CTH A</td> <td>River Rd - USH 10</td> <td>Tomorrow River Bridge B-49-0320 Title Searches</td> <td>\$</td> <td>1/19/16</td> </tr> <tr> <td colspan="8">NE</td> </tr> <tr> <td>4994-07-00</td> <td>0</td> <td>Bay Reporting Services</td> <td>Local Road</td> <td>Oregon/Jackson Street Bridge, City</td> <td>Court Reporting Services</td> <td>\$</td> <td>5/22/15</td> </tr> <tr> <td>9200-06-00</td> <td>0</td> <td>KL Engineering, Inc.</td> <td>STH 29</td> <td>CTH FF to CTH VV Interchanges</td> <td>Design Services</td> <td>\$</td> <td>9/22/10</td> </tr> </tbody> </table> <p>Refresh Date: February 9, 2016 9:58:12 AM GMT-06:00</p>	State Project ID	WO #	Vendor	Highway	Limits	Task	Task Amt	Date Contract Signed	BTO								1000-99-60	7	Traffic Analysis & Design, Inc.	Various	Statewide Traffic Data Collection	Traffic Engineering Services	\$	4/22/15	NC								1166-02-11	0	Mead & Hunt, Inc.	IH 39	Stevens Point-Wausau,STH 153 B-3 Sec 106 Prep		\$	8/15/11	1166-02-11	0	TRC Environmental, Corp.	IH 39	Stevens Point-Wausau,STH 153 B-3 Sec 106 Prep		\$	8/15/11	1170-00-04	0	Bloom Companies, LLC	USH 51	Wausau - Merrill, B-37-155, 156, 156	Roadway Plans	\$	8/31/12	1170-00-04	0	Soils & Engineering Services, Inc.	USH 51	Wausau - Merrill, B-37-155, 156, 156	Geotechnical Engineering	\$	8/31/12	6784-00-00	0	Portage County Title	CTH A	River Rd - USH 10	Tomorrow River Bridge B-49-0320 Title Searches	\$	1/19/16	NE								4994-07-00	0	Bay Reporting Services	Local Road	Oregon/Jackson Street Bridge, City	Court Reporting Services	\$	5/22/15	9200-06-00	0	KL Engineering, Inc.	STH 29	CTH FF to CTH VV Interchanges	Design Services	\$	9/22/10
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<p>Invoicing Status Report</p>	<p>Lists invoices in CARS that have been submitted and approved for payment. Three tabs list invoices for WisDOT project managers, local program work orders for WisDOT, and local program contracts, organized by region and ordered by number of days since submission. A fourth tab lists approved invoices currently waiting to be paid.</p> <p>No prompts.</p>	 <p>CARS Invoicing Status Report for Consultant Local Program Managers</p> <p>6/17/2016 2:30:18 PM</p> <p>Region NC</p> <table border="1"> <thead> <tr> <th>Vendor Name</th> <th>Current Status</th> <th>Submitted Date</th> <th>Days Since Submitted</th> <th>Project ID</th> <th>Work Order</th> <th>Contract Number</th> <th>DOT Invoice</th> <th>Consultant Invoice</th> <th>Project Manager</th> </tr> </thead> <tbody> <tr> <td>CORRE, Inc.</td> <td>Submitted</td> <td>6/16/2016</td> <td>1</td> <td>9828-00-00</td> <td></td> <td>1400014023</td> <td>98169</td> <td>2947</td> <td>Gregory Wolfe</td> </tr> <tr> <td>Count</td> <td>1</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Region NE</p> <table border="1"> <thead> <tr> <th>Vendor Name</th> <th>Current Status</th> <th>Submitted Date</th> <th>Days Since Submitted</th> <th>Project ID</th> <th>Work Order</th> <th>Contract Number</th> <th>DOT Invoice</th> <th>Consultant Invoice</th> <th>Project Manager</th> </tr> </thead> <tbody> <tr> <td>Donohue & Associates, Inc.</td> <td>Submitted</td> <td>6/15/2016</td> <td>2</td> <td>4996-01-72</td> <td></td> <td>1400012023</td> <td>97049</td> <td>12927-10</td> <td>Rich Glen</td> </tr> <tr> <td>Donohue & Associates, Inc.</td> <td>Submitted</td> <td>6/15/2016</td> <td>2</td> <td>4304-03-00</td> <td></td> <td>214134304</td> <td>93478</td> <td>12612-11</td> <td>Jeff Saxby</td> </tr> <tr> <td>Donohue & Associates, Inc.</td> <td>Submitted</td> <td>6/15/2016</td> <td>2</td> <td>4304-04-00</td> <td></td> <td>214134304</td> <td>93471</td> <td>12613-10</td> <td>Jeff Saxby</td> </tr> <tr> <td>Omni Associates, Inc.</td> <td>Submitted</td> <td>6/16/2016</td> <td>1</td> <td>4994-01-15</td> <td></td> <td>1400015272</td> <td>98184</td> <td>E2224A16-03</td> <td>Rich Glen</td> </tr> <tr> <td>Omni Associates, Inc.</td> <td>Submitted</td> <td>6/16/2016</td> <td>1</td> <td>6498-05-71</td> <td></td> <td>1400015270</td> <td>98231</td> <td>E2227A16-01</td> <td>Rich Glen</td> </tr> <tr> <td>AECOM Technical Services, Inc.</td> <td>Submitted</td> <td>6/17/2016</td> <td>0</td> <td>9087-01-00</td> <td></td> <td>1400011363</td> <td>98508</td> <td>37765470</td> <td>Rich Glen</td> </tr> <tr> <td>Omni Associates, Inc.</td> <td>Submitted</td> <td>6/17/2016</td> <td>0</td> <td>9287-03-00</td> <td></td> <td>1400011791</td> <td>97768</td> <td>E2165A15-09</td> <td>Jeff Saxby</td> </tr> <tr> <td>Omni Associates, Inc.</td> <td>Submitted</td> <td>6/17/2016</td> <td>0</td> <td>4616-02-00</td> <td></td> <td>1400011790</td> <td>97923</td> <td>E2166D15-07</td> <td>Jeff Saxby</td> </tr> <tr> <td>Omni Associates, Inc.</td> <td>Submitted</td> <td>6/17/2016</td> <td>0</td> <td>4394-03-00</td> <td></td> <td>1400012905</td> <td>97947</td> <td>E2189A15-04</td> <td>Jeff Saxby</td> </tr> <tr> <td>Omni Associates, Inc.</td> <td>Submitted</td> <td>6/17/2016</td> <td>0</td> <td>4376-06-00</td> <td></td> <td>1400012904</td> <td>97949</td> <td>E2190A15-06</td> <td>Jeff Saxby</td> </tr> <tr> <td>Count</td> <td>10</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Region NW</p>	Vendor Name	Current Status	Submitted Date	Days Since Submitted	Project ID	Work Order	Contract Number	DOT Invoice	Consultant Invoice	Project Manager	CORRE, Inc.	Submitted	6/16/2016	1	9828-00-00		1400014023	98169	2947	Gregory Wolfe	Count	1									Vendor Name	Current Status	Submitted Date	Days Since Submitted	Project ID	Work Order	Contract Number	DOT Invoice	Consultant Invoice	Project Manager	Donohue & Associates, Inc.	Submitted	6/15/2016	2	4996-01-72		1400012023	97049	12927-10	Rich Glen	Donohue & Associates, Inc.	Submitted	6/15/2016	2	4304-03-00		214134304	93478	12612-11	Jeff Saxby	Donohue & Associates, Inc.	Submitted	6/15/2016	2	4304-04-00		214134304	93471	12613-10	Jeff Saxby	Omni Associates, Inc.	Submitted	6/16/2016	1	4994-01-15		1400015272	98184	E2224A16-03	Rich Glen	Omni Associates, Inc.	Submitted	6/16/2016	1	6498-05-71		1400015270	98231	E2227A16-01	Rich Glen	AECOM Technical Services, Inc.	Submitted	6/17/2016	0	9087-01-00		1400011363	98508	37765470	Rich Glen	Omni Associates, Inc.	Submitted	6/17/2016	0	9287-03-00		1400011791	97768	E2165A15-09	Jeff Saxby	Omni Associates, Inc.	Submitted	6/17/2016	0	4616-02-00		1400011790	97923	E2166D15-07	Jeff Saxby	Omni Associates, Inc.	Submitted	6/17/2016	0	4394-03-00		1400012905	97947	E2189A15-04	Jeff Saxby	Omni Associates, Inc.	Submitted	6/17/2016	0	4376-06-00		1400012904	97949	E2190A15-06	Jeff Saxby	Count	10								
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Report	Description	Prompt and Results Dialog Box Images																																																																																										
<p>Master Summary</p>	<p>This report is accessed from the CARS <i>View Master Contract</i> or <i>View Work Order</i> page in the Contract Reports section for master contracts and work orders only. It is not available in the Business Objects Reports list. The main menu for reports does not appear on reports outside the BO Reports list.</p> <p>The report lists the master contract group information, including contract maximums for each vendor plus totals, and the percent of funds spent and available.</p> <p>No prompts.</p>	<p>Current Master Contracts Balances and Contacts, Totals by Contract 10-Feb-16</p> <table border="1"> <thead> <tr> <th>Master Contract ID</th> <th>Vendor</th> <th>WisDOT Contact:</th> <th>Date Approved</th> <th>Completion Date</th> <th>Master Contract Maximum/Group Work Order Limit</th> <th>Work Order Total:</th> <th>Initial Est Amt</th> <th>Master Contract or Group Balance:</th> <th>Percent Used</th> </tr> </thead> <tbody> <tr> <td colspan="10">BHM</td> </tr> <tr> <td colspan="10">Services</td> </tr> <tr> <td>M069750</td> <td></td> <td></td> <td>11/17/15</td> <td>9/30/17</td> <td>\$200,000.00</td> <td>\$0.00</td> <td>\$68,000.00</td> <td>\$132,000.00</td> <td>34%</td> </tr> <tr> <td>M069750</td> <td></td> <td></td> <td>11/17/15</td> <td>9/30/17</td> <td>\$200,000.00</td> <td>\$49,995.62</td> <td></td> <td>\$150,004.38</td> <td>25%</td> </tr> <tr> <td>M069750</td> <td></td> <td></td> <td>11/17/15</td> <td>9/30/17</td> <td>\$200,000.00</td> <td>\$0.00</td> <td>\$50,000.00</td> <td>\$150,000.00</td> <td>25%</td> </tr> <tr> <td colspan="5">Master Contract Group Totals (only work orders sum due to Percent Limit rule):</td> <td>\$360,000.00</td> <td>\$49,995.62</td> <td>\$118,000.00</td> <td>\$192,004.38</td> <td>28%</td> </tr> <tr> <td colspan="5">Region Totals:</td> <td>\$360,000.00</td> <td>\$49,995.62</td> <td>\$118,000.00</td> <td>\$192,004.38</td> <td></td> </tr> <tr> <td colspan="2">Total Work Order Authority:</td> <td colspan="2">\$360,000.00</td> <td colspan="2">Work Order Total:</td> <td colspan="2">\$49,995.62</td> <td colspan="2">Total Balance: \$310,004.38</td> </tr> </tbody> </table> <p>Refresh Date: February 10, 2016 3:34:21 PM GMT-06:00</p>	Master Contract ID	Vendor	WisDOT Contact:	Date Approved	Completion Date	Master Contract Maximum/Group Work Order Limit	Work Order Total:	Initial Est Amt	Master Contract or Group Balance:	Percent Used	BHM										Services										M069750			11/17/15	9/30/17	\$200,000.00	\$0.00	\$68,000.00	\$132,000.00	34%	M069750			11/17/15	9/30/17	\$200,000.00	\$49,995.62		\$150,004.38	25%	M069750			11/17/15	9/30/17	\$200,000.00	\$0.00	\$50,000.00	\$150,000.00	25%	Master Contract Group Totals (only work orders sum due to Percent Limit rule):					\$360,000.00	\$49,995.62	\$118,000.00	\$192,004.38	28%	Region Totals:					\$360,000.00	\$49,995.62	\$118,000.00	\$192,004.38		Total Work Order Authority:		\$360,000.00		Work Order Total:		\$49,995.62		Total Balance: \$310,004.38	
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Open Projects

Lists projects that are open for charges in **EAPS**. Two tabs list open contracts where a vendor is either prime or sub, and where the vendor is prime only.

Prompts -all optional:

- Region
- Vendor Name

"Open" Workload as Primes and Subcontractors Detailed

10-Feb-16

"Open" projects are those still open for charging in EAPS. Consultants work may be completed on the project before the final invoice is sent to

State Project ID	Function	Region	Highway	Limits	Date of Selection	Date Submitted	Date Approved	Date Authorized	Revised Comp. Date	Initial Estimate Amount	Total Contract Costs w/Amend	
Prime												
1000-08-80	Traffic Engineering S-NW	STH 93	NW Region, Various Signalized I		10/07/2015	12/14/2015	12/15/2015	12/15/2015	01/01/2018		\$88,203.29	
1000-08-82	Traffic Engineering S-NW	Various	Region Wide - Various Locations		09/23/2015	12/14/2015	12/10/2015	12/10/2015	01/01/2018		\$18,258.54	
1023-03-02	Traffic Engineering S-NW	IH 94	Black River Falls - Tomah		01/21/2016					\$18,130.00	\$0.00	
1198-03-05	Traffic Engineering S-NW	USH 53	Minong-Superior CTH Y / CTH L / Middle River Rd Intersection Control Eval Study		01/26/2016					\$45,000.00	\$0.00	
1570-05-01	Design Services NW	USH 8	Turtle Lake-Cameron 5th Street to 8th Street		04/07/2015	05/25/2015	05/18/2015	05/18/2015	03/01/2016		\$36,312.99	
3700-50-12	Traffic Engineering S-NW	USH 53	ITS Installation Eau Claire, STH 93			12/14/2015	12/15/2015	12/15/2015	01/01/2018		\$87,529.96	
3700-50-16	Traffic Engineering S-NW	STH 93	Golf Road Intersection ITS Installation		10/06/2015	12/14/2015	12/10/2015	12/10/2015	01/01/2018		\$15,000.51	
7130-01-02	Design Services NW	STH 93	City of Arcadia, Detloff Dr - STH		08/19/2013	02/17/2014	02/19/2014	02/19/2014	03/01/2016		\$151,359.37	
7130-01-03	Design Services NW	STH 93	City of Arcadia, STH 95 Intersect		08/20/2014	12/02/2014	12/19/2014	12/19/2014	05/01/2019		\$174,355.72	
Total Number of Projects as Prime: 15											\$1,314,259.55	
Open projects as Prime where project is past estimated completion date : 3											\$102,046.49	7.8%
Subcontract												
1020-00-06	Hazardous Materials NW	IH 94	Hudson - Menomonie, West Cou		12/19/2011	05/11/2012	05/24/2012	05/24/2012	09/30/2016		\$45,135.52	



Open Projects for Consultants

Lists contracts and work orders where contract completion date, including amendments is in the future. Project list includes only those where submitted dates are entered. Includes project information and important dates. Reports total contract cost with amendments included. Grouped by vendor name, and subdivided by prime and subcontract roles.

Two tabs list open contracts where a vendor is either prime or sub, and where the vendor is prime only.

Prompts -all optional:

- Region
- Vendor Name

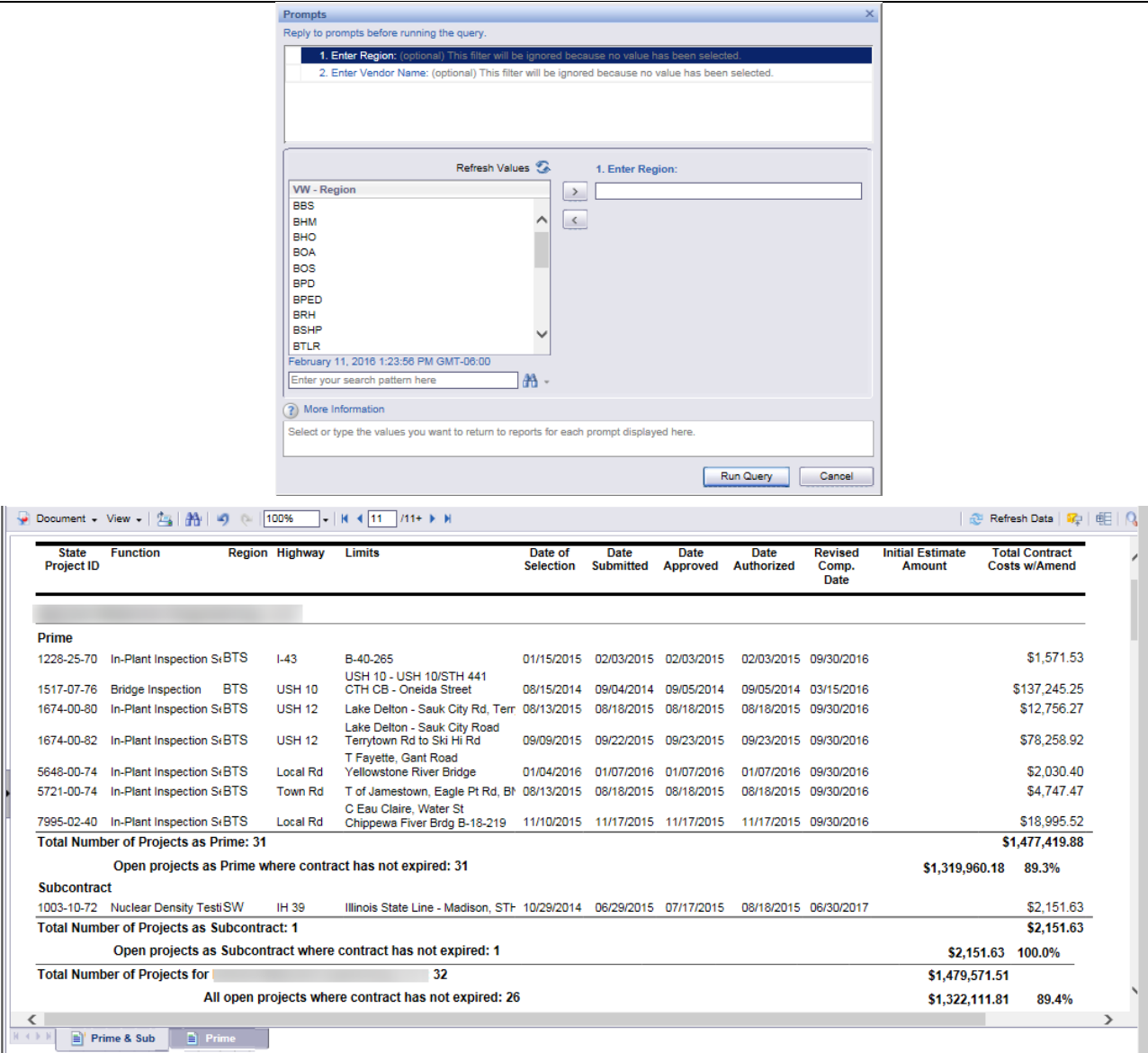
SAP BUSINESSOBJECTS INFOVIEW

Web Intelligence - Open Projects for Consultants

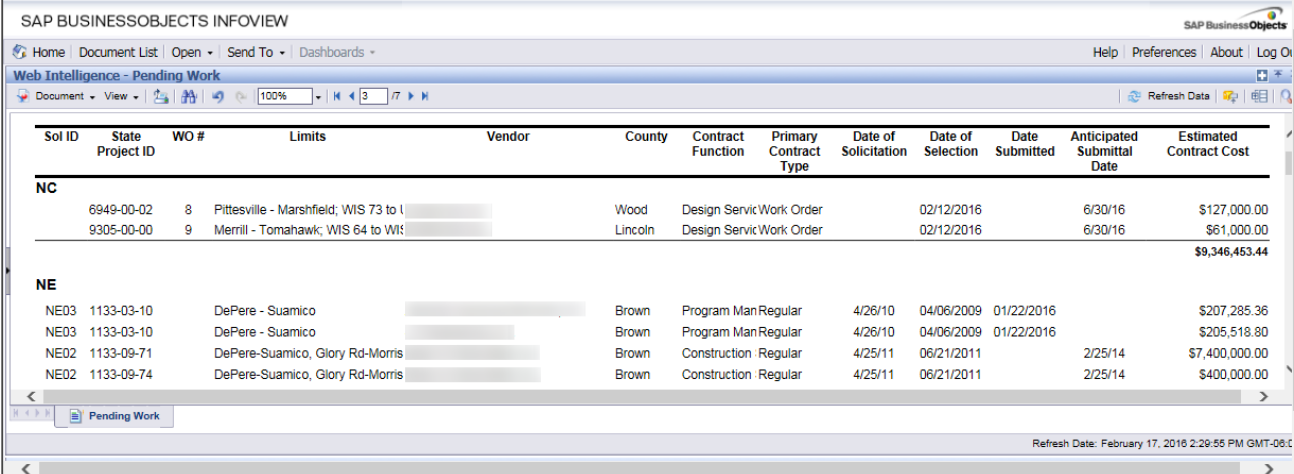
State	Function	Region	Highway	Limits	Date of Selection	Date Submitted	Date Approved	Date Authorized	Revised Comp. Date	Total Contract Costs w/Amend and If Authorized Cost
Subcontract										
1000-96-71	Planning And/Or Studies	NW	Non-Hwy	St Croix County Bike & Pedestrian Plan	04/29/2015	05/22/2015	06/09/2015	06/09/2015	09/30/2016	\$24,227.63
Total Number of Projects as Subcontract: 1										\$24,227.63
Open projects as Subcontract where project is past estimated completion date : 0										\$0.00 0.0%
Total Number of Projects for : 1										\$24,227.63
All open projects where contract is past estimated completion date: 0										\$0.00 0.0%
Subcontract										
7730-00-30	Title Searches	NW	STH 88	Czechville - Mondovi, CTH E - STH 37	07/25/2012	08/28/2012	08/29/2012	08/29/2012	07/01/2015	\$24,000.00
Total Number of Projects as Subcontract: 1										\$24,000.00
Open projects as Subcontract where project is past estimated completion date : 1										\$24,000.00 100.0%
Total Number of Projects for : 1										\$24,000.00
All open projects where contract is past estimated completion date: 1										\$24,000.00 100.0%

Refresh Date: February 11, 2016 1:47:34 PM GMT-08:00

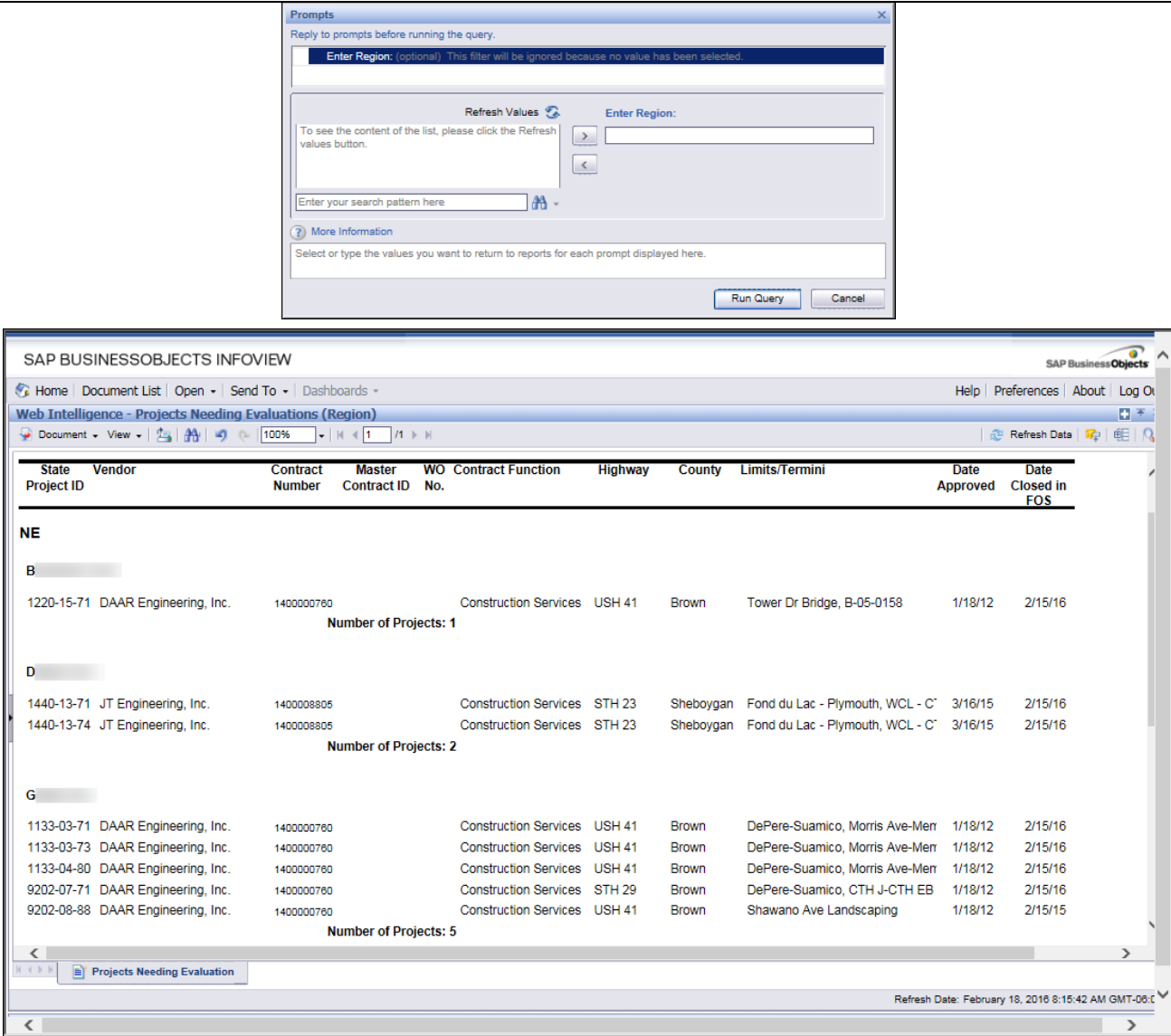


Report	Description	Prompt and Results Dialog Box Images																																																																																																																																																																																																												
<p>Open Projects with Initial Estimate Amount</p>	<p>Lists contracts and work orders where contract completion date is in the future, including amendments and contracts not yet executed. Shows project information and important dates. Initial estimate amount is shown as a total. Grouped by vendor name, and subdivided by prime and subcontract roles.</p> <p>Two tabs list open contracts where a vendor is either prime or sub, and where the vendor is prime only.</p> <p>Prompts -all optional:</p> <ul style="list-style-type: none"> • Region • Vendor Name 	 <table border="1"> <thead> <tr> <th>State Project ID</th> <th>Function</th> <th>Region</th> <th>Highway</th> <th>Limits</th> <th>Date of Selection</th> <th>Date Submitted</th> <th>Date Approved</th> <th>Date Authorized</th> <th>Revised Comp. 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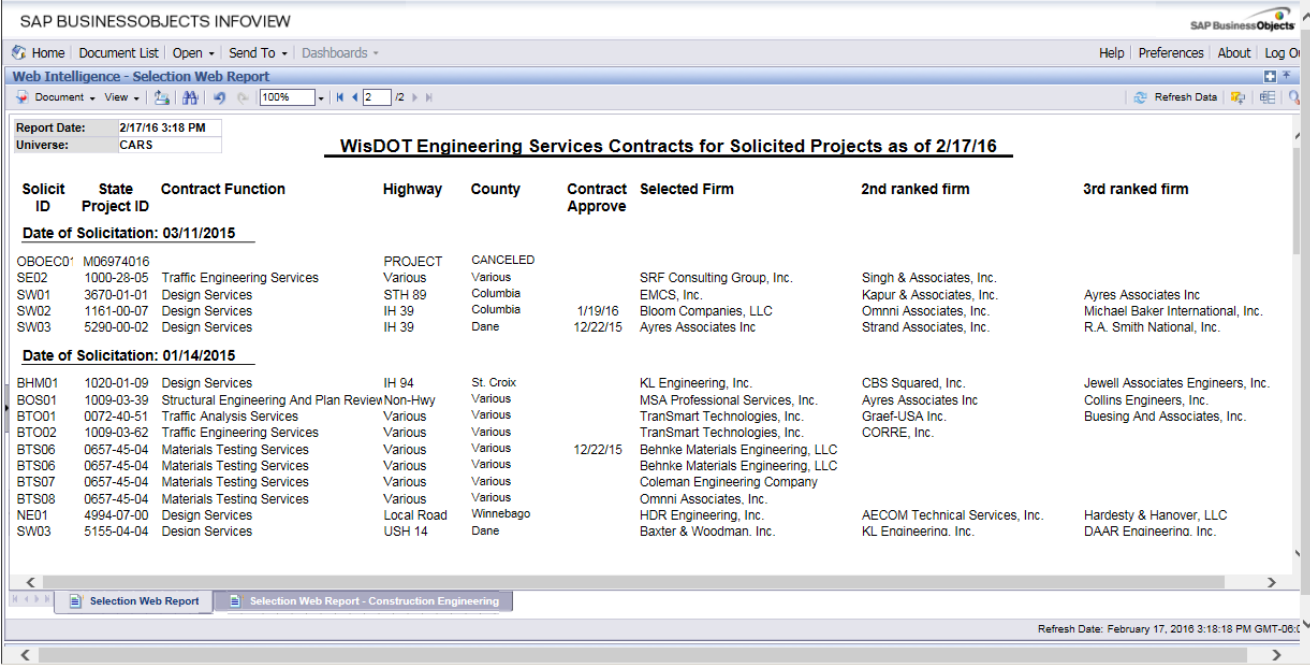


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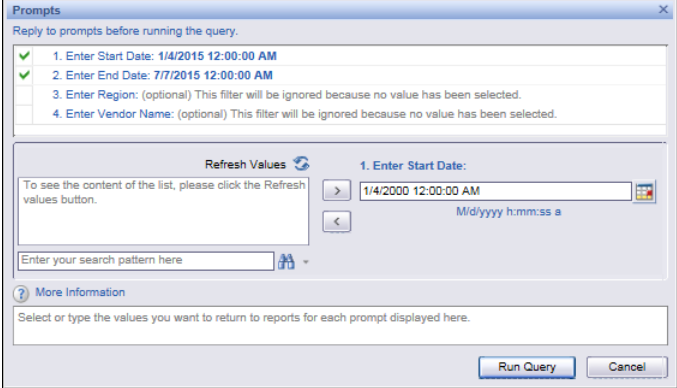
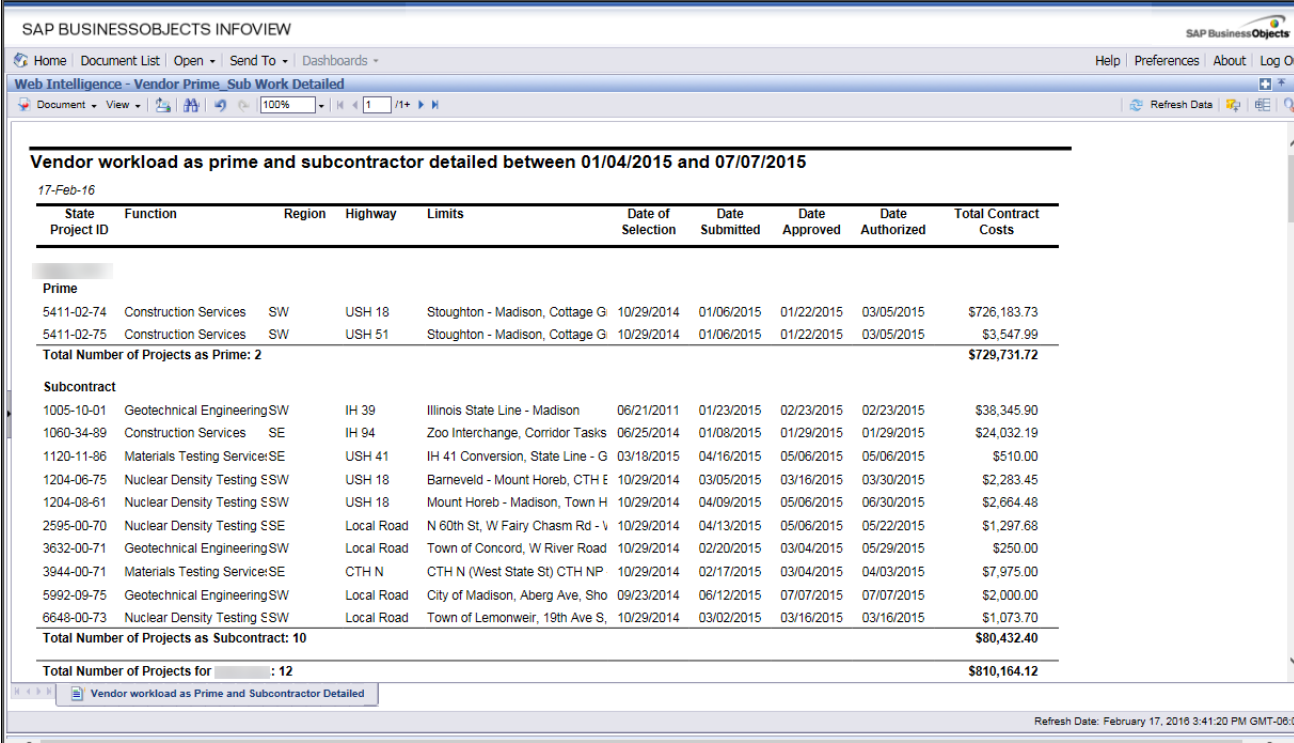


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The table has the following columns: State Project ID, Vendor, Contract Number, Master Contract ID, WO No., Contract Function, Highway, County, Limits/Termini, Date Approved, and Date Closed in FOS. 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1133-04-80	DAAR Engineering, Inc.	140000760			Construction Services	USH 41	Brown	DePere-Suamico, Morris Ave-Mer	1/18/12	2/15/16																																																																																																																																																																								
9202-07-71	DAAR Engineering, Inc.	140000760			Construction Services	STH 29	Brown	DePere-Suamico, CTH J-CTH EB	1/18/12	2/15/16																																																																																																																																																																								
9202-08-88	DAAR Engineering, Inc.	140000760			Construction Services	USH 41	Brown	Shawano Ave Landscaping	1/18/12	2/15/15																																																																																																																																																																								
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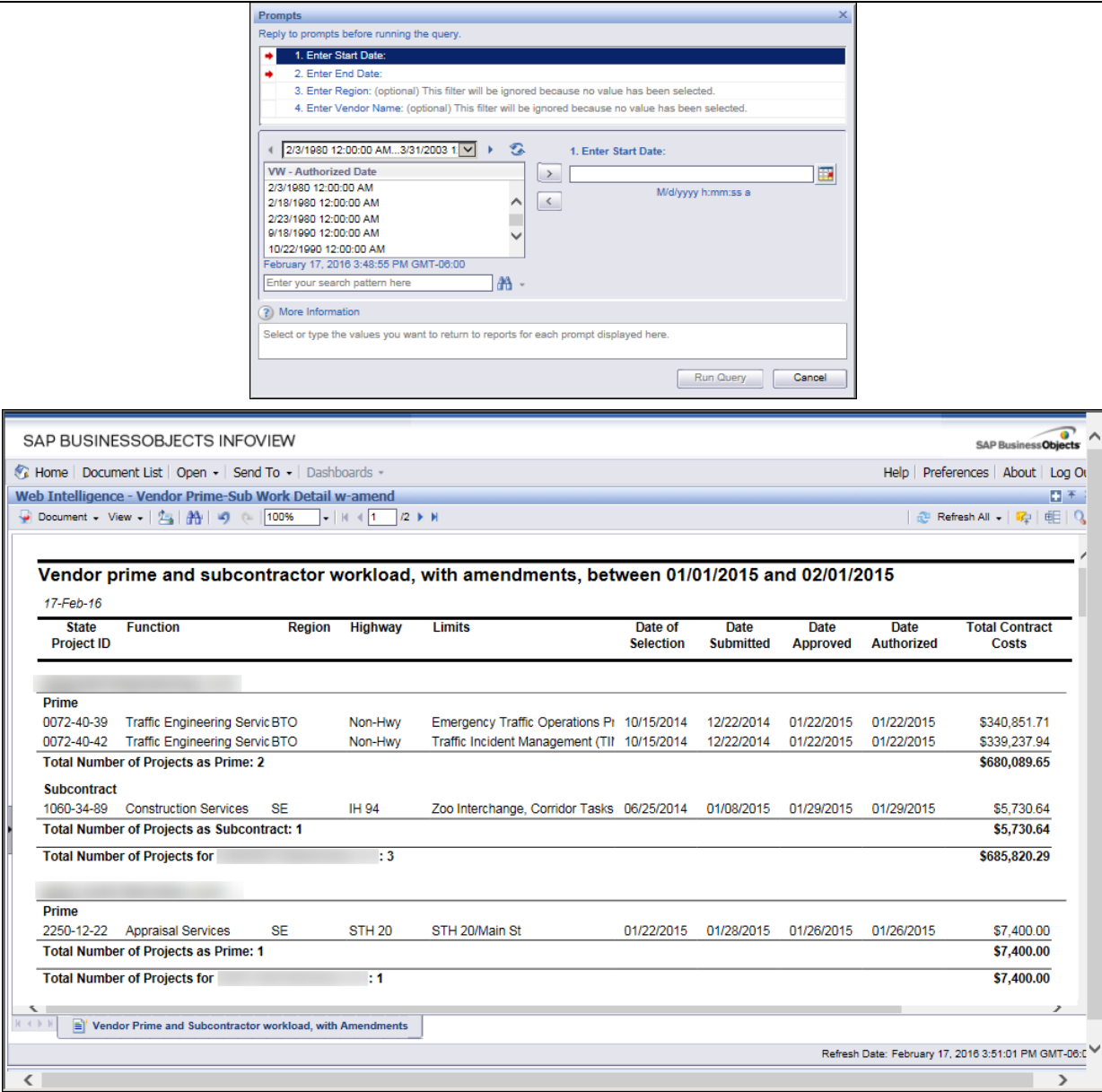


Report	Description	Prompt and Results Dialog Box Images																																																																																																																																																																		
<p>Selection Web Report</p>	<p>Lists consultant selections for solicited projects by solicitation date. Pertinent data such as solicitation ID, project ID, contract function, highway, county and ranked firms are included. There are two tabs for this report: one for rolling solicitations and one for construction engineering.</p> <p>No prompts.</p>	 <p>SAP BUSINESSOBJECTS INFOVIEW</p> <p>Web Intelligence - Selection Web Report</p> <p>Report Date: 2/17/16 3:18 PM Universe: CARS</p> <p>WisDOT Engineering Services Contracts for Solicited Projects as of 2/17/16</p> <table border="1"> <thead> <tr> <th>Solicit ID</th> <th>State Project ID</th> <th>Contract Function</th> <th>Highway</th> <th>County</th> <th>Contract Approve</th> <th>Selected Firm</th> <th>2nd ranked firm</th> <th>3rd ranked firm</th> </tr> </thead> <tbody> <tr> <td colspan="9">Date of Solicitation: 03/11/2015</td> </tr> <tr> <td>OBOEC01</td> <td>M06974016</td> <td></td> <td>PROJECT</td> <td>CANCELED</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>SE02</td> <td>1000-28-05</td> <td>Traffic Engineering Services</td> <td>Various</td> <td>Various</td> <td></td> <td>SRF Consulting Group, Inc.</td> <td>Singh & Associates, Inc.</td> <td></td> </tr> <tr> <td>SW01</td> <td>3670-01-01</td> <td>Design Services</td> <td>STH 89</td> <td>Columbia</td> <td></td> <td>EMCS, Inc.</td> <td>Kapur & Associates, Inc.</td> <td>Ayres Associates Inc</td> </tr> <tr> <td>SW02</td> <td>1161-00-07</td> <td>Design Services</td> <td>IH 39</td> <td>Columbia</td> <td>1/19/16</td> <td>Bloom Companies, LLC</td> <td>Omni Associates, Inc.</td> <td>Michael Baker International, Inc.</td> </tr> <tr> <td>SW03</td> <td>5290-00-02</td> <td>Design Services</td> <td>IH 39</td> <td>Dane</td> <td>12/22/15</td> <td>Ayres Associates Inc</td> <td>Strand Associates, Inc.</td> <td>R.A. 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Singh & Associates, Inc.		SW01	3670-01-01	Design Services	STH 89	Columbia		EMCS, Inc.	Kapur & Associates, Inc.	Ayres Associates Inc	SW02	1161-00-07	Design Services	IH 39	Columbia	1/19/16	Bloom Companies, LLC	Omni Associates, Inc.	Michael Baker International, Inc.	SW03	5290-00-02	Design Services	IH 39	Dane	12/22/15	Ayres Associates Inc	Strand Associates, Inc.	R.A. Smith National, Inc.	Date of Solicitation: 01/14/2015									BHM01	1020-01-09	Design Services	IH 94	St. Croix		KL Engineering, Inc.	CBS Squared, Inc.	Jewell Associates Engineers, Inc.	BOS01	1009-03-39	Structural Engineering And Plan Review	Non-Hwy	Various		MSA Professional Services, Inc.	Ayres Associates Inc	Collins Engineers, Inc.	BTO01	0072-40-51	Traffic Analysis Services	Various	Various		TranSmart Technologies, Inc.	Graef-USA Inc.	Buesing And Associates, Inc.	BTO02	1009-03-62	Traffic Engineering Services	Various	Various		TranSmart Technologies, Inc.	CORRE, Inc.		BTS06	0657-45-04	Materials Testing Services	Various	Various	12/22/15	Behnke Materials Engineering, LLC			BTS06	0657-45-04	Materials Testing Services	Various	Various		Behnke Materials Engineering, LLC			BTS07	0657-45-04	Materials Testing Services	Various	Various		Coleman Engineering Company			BTS08	0657-45-04	Materials Testing Services	Various	Various		Omni Associates, Inc.			NE01	4994-07-00	Design Services	Local Road	Winnebago		HDR Engineering, Inc.	AECOM Technical Services, Inc.	Hardesty & Hanover, LLC	SW03	5155-04-04	Design Services	USH 14	Dane		Baxter & Woodman, Inc.	KL Engineering, Inc.	DAAR Engineering, Inc.
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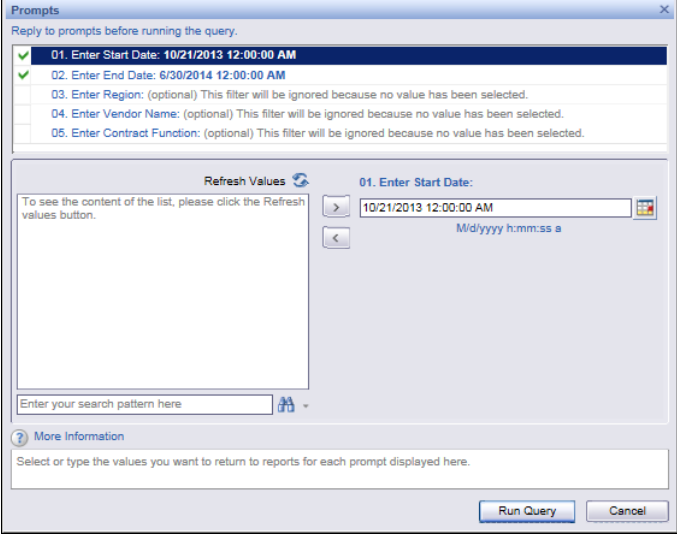
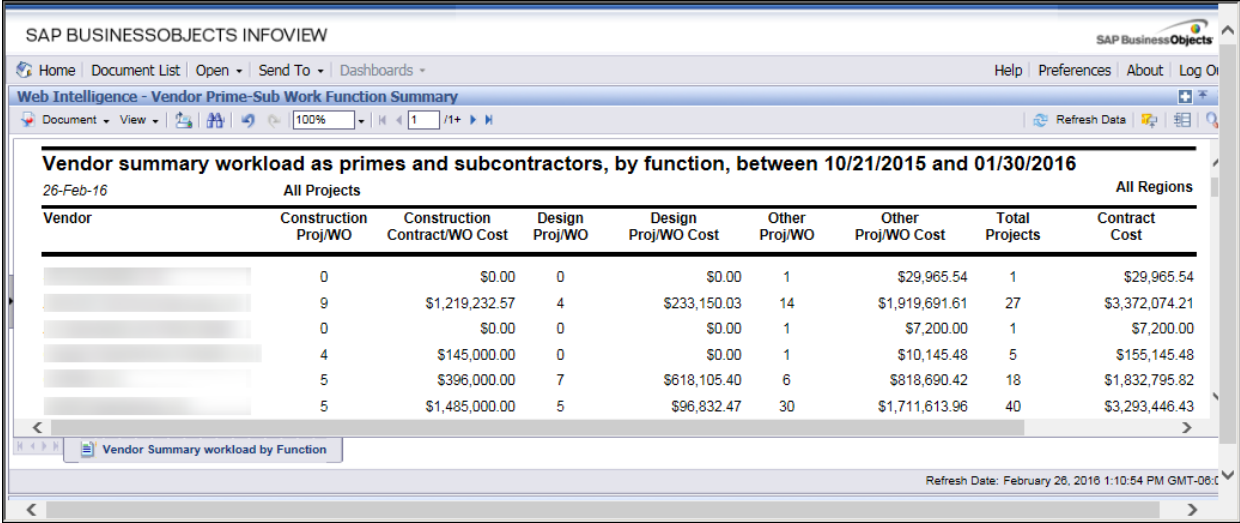


Report	Description	Prompt and Results Dialog Box Images																																																																																																																																																																																				
<p>Vendor Prime_Sub Work Detailed</p>	<p>Lists prime and subcontract details by vendor. Includes detailed information about the project as well as important dates in contract process and total contract costs. Also includes contracts and work orders that are not yet approved.</p> <p>Prompts - start and end dates are required; region and vendor name are optional:</p> <ul style="list-style-type: none"> • Start Date - start date of the date range • End Date - end date of the date range • Region • Vendor Name 	 <p>The 'Prompts' dialog box contains the following prompts:</p> <ol style="list-style-type: none"> 1. Enter Start Date: 1/4/2015 12:00:00 AM 2. Enter End Date: 7/7/2015 12:00:00 AM 3. Enter Region: (optional) This filter will be ignored because no value has been selected. 4. Enter Vendor Name: (optional) This filter will be ignored because no value has been selected. <p>Below the prompts is a 'Refresh Values' section with a date input field set to '1/4/2000 12:00:00 AM' and a search pattern field.</p>  <p>The screenshot shows the SAP BusinessObjects InfoView interface displaying a report titled 'Vendor workload as prime and subcontractor detailed between 01/04/2015 and 07/07/2015'. The report is dated 17-Feb-16 and shows a table of project data.</p> <table border="1"> <thead> <tr> <th>State Project ID</th> <th>Function</th> <th>Region</th> <th>Highway</th> <th>Limits</th> <th>Date Selection</th> <th>Date Submitted</th> <th>Date Approved</th> <th>Date Authorized</th> <th>Total Contract Costs</th> </tr> </thead> <tbody> <tr> <td colspan="10">Prime</td> </tr> <tr> <td>5411-02-74</td> <td>Construction Services</td> <td>SW</td> <td>USH 18</td> <td>Stoughton - Madison, Cottage G</td> <td>10/29/2014</td> <td>01/06/2015</td> <td>01/22/2015</td> <td>03/05/2015</td> <td>\$726,183.73</td> </tr> <tr> <td>5411-02-75</td> <td>Construction Services</td> <td>SW</td> <td>USH 51</td> <td>Stoughton - Madison, Cottage G</td> <td>10/29/2014</td> <td>01/06/2015</td> <td>01/22/2015</td> <td>03/05/2015</td> <td>\$3,547.99</td> </tr> <tr> <td colspan="9">Total Number of Projects as Prime: 2</td> <td>\$729,731.72</td> </tr> <tr> <td colspan="10">Subcontract</td> </tr> <tr> <td>1005-10-01</td> <td>Geotechnical Engineering</td> <td>SW</td> <td>IH 39</td> <td>Illinois State Line - 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Total Number of Projects for									\$810,164.12																																																																																																																																																																													

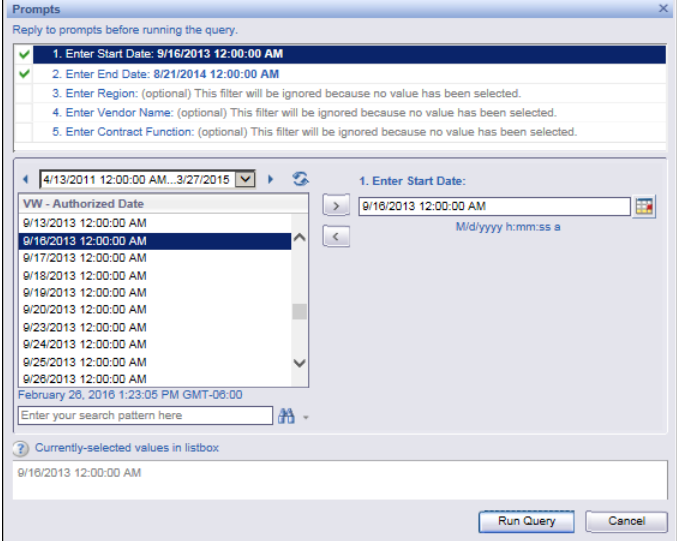
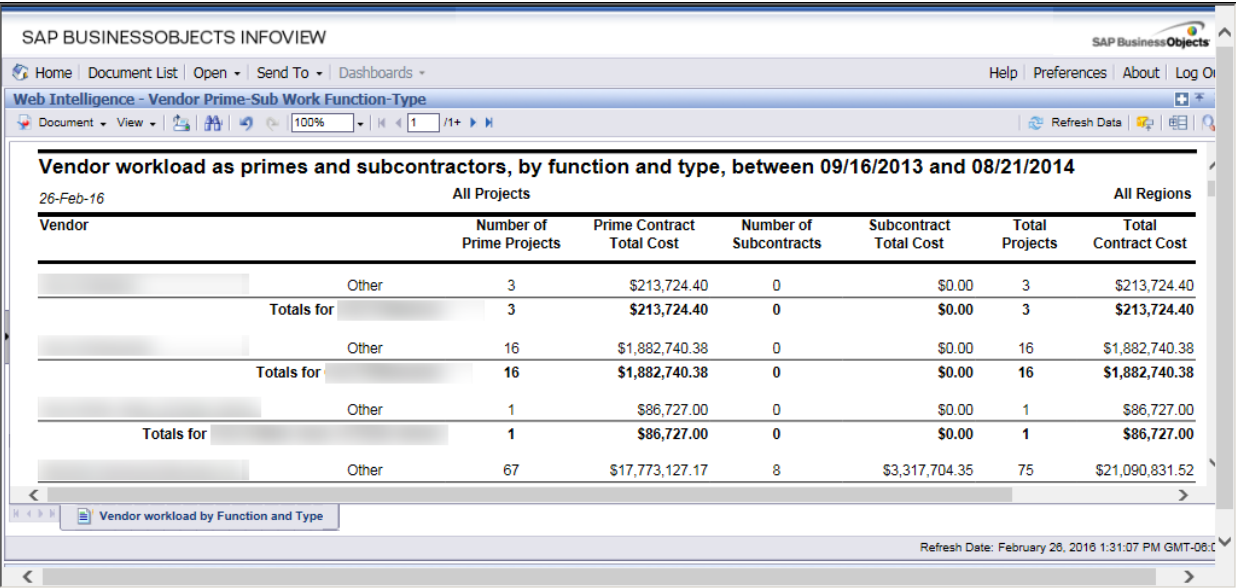


Report	Description	Prompt and Results Dialog Box Images																																																																																																																																																						
<p>Vendor Prime_Sub Work Detail w-amend</p>	<p>Lists prime and subcontract details by vendor. Includes detailed information about projects as well as important dates and total contract costs with amendments. Also includes contracts and work orders that are not yet approved.</p> <p>Prompts - start and end dates are required; region and vendor name are optional:</p> <ul style="list-style-type: none"> • Start Date - start date of the date range • End Date - end date of the date range • Region • Vendor Name 	 <p>The image shows two screenshots from SAP BusinessObjects InfoView. The top screenshot is a 'Prompts' dialog box with the following prompts:</p> <ol style="list-style-type: none"> 1. Enter Start Date: 2. Enter End Date: 3. Enter Region: (optional) This filter will be ignored because no value has been selected. 4. Enter Vendor Name: (optional) This filter will be ignored because no value has been selected. <p>The bottom screenshot shows the report results for the period 01/01/2015 to 02/01/2015. The report is titled 'Vendor prime and subcontractor workload, with amendments, between 01/01/2015 and 02/01/2015' and is dated 17-Feb-16. The data is presented in a table with columns: State, Function, Region, Highway, Limits, Date of Selection, Date Submitted, Date Approved, Date Authorized, and Total Contract Costs.</p> <table border="1"> <thead> <tr> <th>State</th> <th>Function</th> <th>Region</th> <th>Highway</th> <th>Limits</th> <th>Date of Selection</th> <th>Date Submitted</th> <th>Date Approved</th> <th>Date Authorized</th> <th>Total Contract Costs</th> </tr> </thead> <tbody> <tr> <td colspan="10">Prime</td> </tr> <tr> <td>0072-40-39</td> <td>Traffic Engineering Servic</td> <td>BTO</td> <td>Non-Hwy</td> <td>Emergency Traffic Operations Pi</td> <td>10/15/2014</td> <td>12/22/2014</td> <td>01/22/2015</td> <td>01/22/2015</td> <td>\$340,851.71</td> </tr> <tr> <td>0072-40-42</td> <td>Traffic Engineering Servic</td> <td>BTO</td> <td>Non-Hwy</td> <td>Traffic Incident Management (TI)</td> <td>10/15/2014</td> <td>12/22/2014</td> <td>01/22/2015</td> <td>01/22/2015</td> <td>\$339,237.94</td> </tr> <tr> <td colspan="9">Total Number of Projects as Prime: 2</td> <td>\$680,089.65</td> </tr> <tr> <td colspan="10">Subcontract</td> </tr> <tr> <td>1060-34-89</td> <td>Construction Services</td> <td>SE</td> <td>IH 94</td> <td>Zoo Interchange, Corridor Tasks</td> <td>06/25/2014</td> <td>01/08/2015</td> <td>01/29/2015</td> <td>01/29/2015</td> <td>\$5,730.64</td> </tr> <tr> <td colspan="9">Total Number of Projects as Subcontract: 1</td> <td>\$5,730.64</td> </tr> <tr> <td colspan="9">Total Number of Projects for</td> <td>: 3</td> </tr> <tr> <td colspan="9">\$685,820.29</td> <td></td> </tr> <tr> <td colspan="10">Prime</td> </tr> <tr> <td>2250-12-22</td> <td>Appraisal Services</td> <td>SE</td> <td>STH 20</td> <td>STH 20/Main St</td> <td>01/22/2015</td> <td>01/28/2015</td> <td>01/26/2015</td> <td>01/26/2015</td> <td>\$7,400.00</td> </tr> <tr> <td colspan="9">Total Number of Projects as Prime: 1</td> <td>\$7,400.00</td> </tr> <tr> <td colspan="9">Total Number of Projects for</td> <td>: 1</td> </tr> <tr> <td colspan="9">\$7,400.00</td> <td></td> </tr> </tbody> </table>	State	Function	Region	Highway	Limits	Date of Selection	Date Submitted	Date Approved	Date Authorized	Total Contract Costs	Prime										0072-40-39	Traffic Engineering Servic	BTO	Non-Hwy	Emergency Traffic Operations Pi	10/15/2014	12/22/2014	01/22/2015	01/22/2015	\$340,851.71	0072-40-42	Traffic Engineering Servic	BTO	Non-Hwy	Traffic Incident Management (TI)	10/15/2014	12/22/2014	01/22/2015	01/22/2015	\$339,237.94	Total Number of Projects as Prime: 2									\$680,089.65	Subcontract										1060-34-89	Construction Services	SE	IH 94	Zoo Interchange, Corridor Tasks	06/25/2014	01/08/2015	01/29/2015	01/29/2015	\$5,730.64	Total Number of Projects as Subcontract: 1									\$5,730.64	Total Number of Projects for									: 3	\$685,820.29										Prime										2250-12-22	Appraisal Services	SE	STH 20	STH 20/Main St	01/22/2015	01/28/2015	01/26/2015	01/26/2015	\$7,400.00	Total Number of Projects as Prime: 1									\$7,400.00	Total Number of Projects for									: 1	\$7,400.00									
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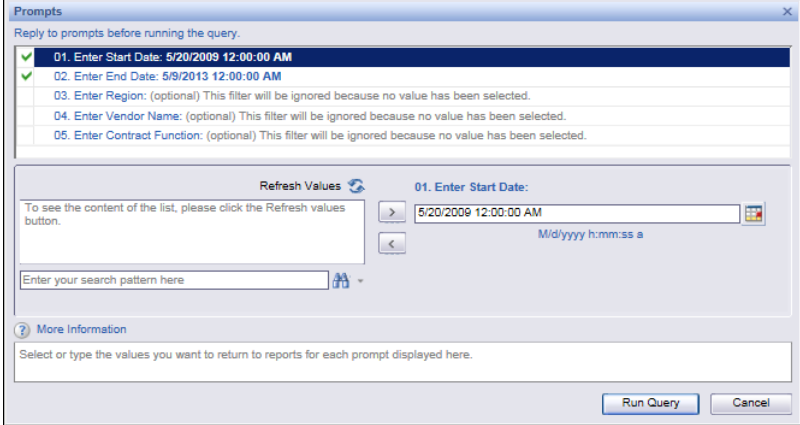
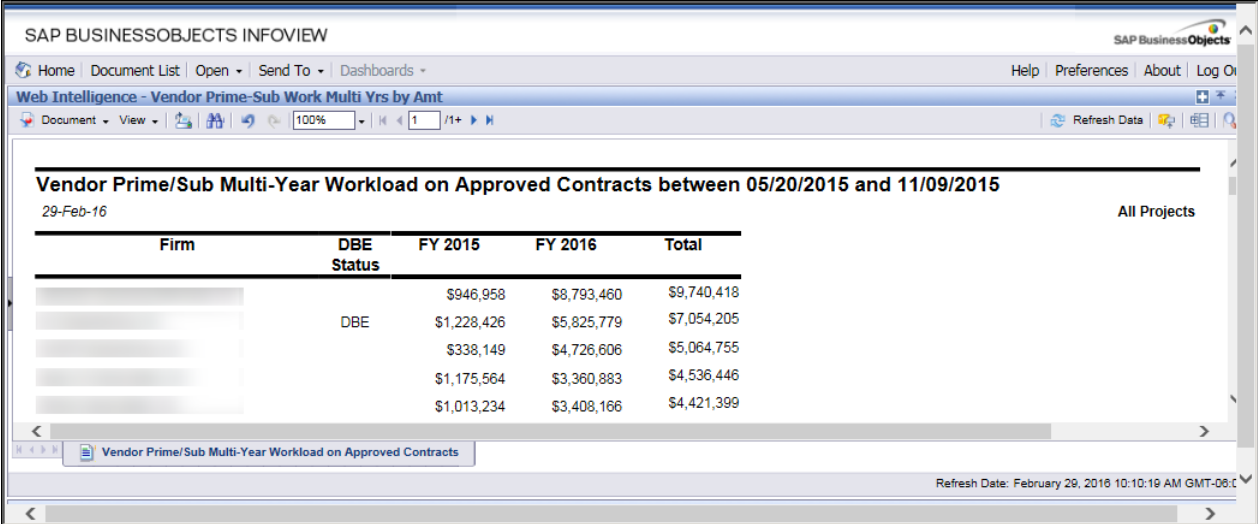


Report	Description	Prompt and Results Dialog Box Images																																																															
<p>Vendor Prime_Sub Work Function Summary</p>	<p>Summarizes prime and subcontracts by vendor. Summarizes number of Construction, Design, and other contract functions as well as original contract cost information. Includes contracts/work orders not approved.</p> <p>Prompts - start and end dates are required; region, vendor name and contract function are optional:</p> <ul style="list-style-type: none"> • Start date - start date of the date range • End date - end date of the date range • Region • Vendor name • Contract Function 	  <table border="1"> <caption>Vendor summary workload as primes and subcontractors, by function, between 10/21/2015 and 01/30/2016</caption> <thead> <tr> <th>Vendor</th> <th>Construction Proj/WO</th> <th>Construction Contract/WO Cost</th> <th>Design Proj/WO</th> <th>Design Proj/WO Cost</th> <th>Other Proj/WO</th> <th>Other Proj/WO Cost</th> <th>Total Projects</th> <th>Contract Cost</th> </tr> </thead> <tbody> <tr> <td></td> <td>0</td> <td>\$0.00</td> <td>0</td> <td>\$0.00</td> <td>1</td> <td>\$29,965.54</td> <td>1</td> <td>\$29,965.54</td> </tr> <tr> <td></td> <td>9</td> <td>\$1,219,232.57</td> <td>4</td> <td>\$233,150.03</td> <td>14</td> <td>\$1,919,691.61</td> <td>27</td> <td>\$3,372,074.21</td> </tr> <tr> <td></td> <td>0</td> <td>\$0.00</td> <td>0</td> <td>\$0.00</td> <td>1</td> <td>\$7,200.00</td> <td>1</td> <td>\$7,200.00</td> </tr> <tr> <td></td> <td>4</td> <td>\$145,000.00</td> <td>0</td> <td>\$0.00</td> <td>1</td> <td>\$10,145.48</td> <td>5</td> <td>\$155,145.48</td> </tr> <tr> <td></td> <td>5</td> <td>\$396,000.00</td> <td>7</td> <td>\$618,105.40</td> <td>6</td> <td>\$818,690.42</td> <td>18</td> <td>\$1,832,795.82</td> </tr> <tr> <td></td> <td>5</td> <td>\$1,485,000.00</td> <td>5</td> <td>\$96,832.47</td> <td>30</td> <td>\$1,711,613.96</td> <td>40</td> <td>\$3,293,446.43</td> </tr> </tbody> </table>	Vendor	Construction Proj/WO	Construction Contract/WO Cost	Design Proj/WO	Design Proj/WO Cost	Other Proj/WO	Other Proj/WO Cost	Total Projects	Contract Cost		0	\$0.00	0	\$0.00	1	\$29,965.54	1	\$29,965.54		9	\$1,219,232.57	4	\$233,150.03	14	\$1,919,691.61	27	\$3,372,074.21		0	\$0.00	0	\$0.00	1	\$7,200.00	1	\$7,200.00		4	\$145,000.00	0	\$0.00	1	\$10,145.48	5	\$155,145.48		5	\$396,000.00	7	\$618,105.40	6	\$818,690.42	18	\$1,832,795.82		5	\$1,485,000.00	5	\$96,832.47	30	\$1,711,613.96	40	\$3,293,446.43
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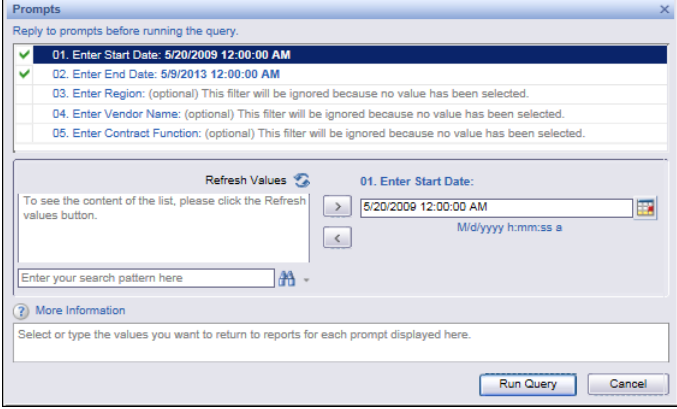
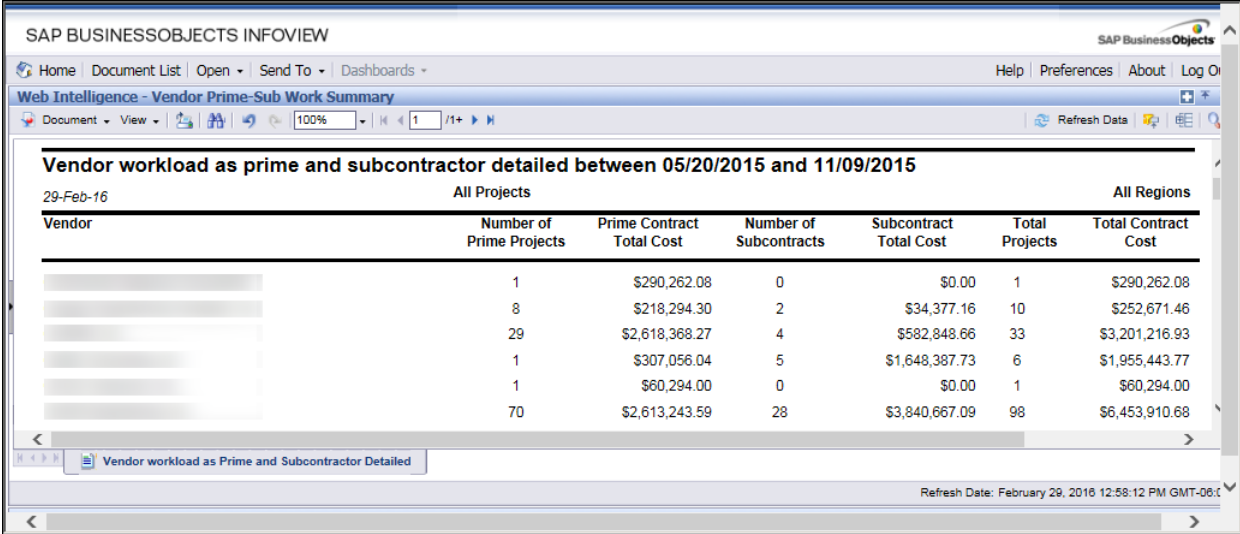


Report	Description	Prompt and Results Dialog Box Images																																																																																
<p>Vendor Prime_Sub Work Function-Type</p>	<p>Summarizes prime and subcontracts by vendor. Shows number of times vendor was selected as Prime/Sub for a particular contract function, and the total cost of those projects. Includes contracts and work orders that are not yet not approved.</p> <p>Prompts - start and end dates are required; region, vendor name and contract function are optional:</p> <ul style="list-style-type: none"> • Start date - start date of the date range • End date - end date of the date range • Region • Vendor Name • Contract Function 	 <p>The Prompts dialog box contains the following prompts:</p> <ol style="list-style-type: none"> 1. Enter Start Date: 9/16/2013 12:00:00 AM 2. Enter End Date: 8/21/2014 12:00:00 AM 3. Enter Region: (optional) This filter will be ignored because no value has been selected. 4. Enter Vendor Name: (optional) This filter will be ignored because no value has been selected. 5. Enter Contract Function: (optional) This filter will be ignored because no value has been selected. <p>The dialog also shows a date range selector for '4/13/2011 12:00:00 AM...3/27/2015' and a list of 'VW - Authorized Date' values from 9/13/2013 to 9/26/2013. A search pattern field is present at the bottom.</p>  <p>The SAP BusinessObjects InfoView report displays the following data:</p> <table border="1"> <thead> <tr> <th colspan="8">Vendor workload as primes and subcontractors, by function and type, between 09/16/2013 and 08/21/2014</th> </tr> <tr> <th colspan="2"></th> <th colspan="4">All Projects</th> <th colspan="2">All Regions</th> </tr> <tr> <th>Vendor</th> <th></th> <th>Number of Prime Projects</th> <th>Prime Contract Total Cost</th> <th>Number of Subcontracts</th> <th>Subcontract Total Cost</th> <th>Total Projects</th> <th>Total Contract Cost</th> </tr> </thead> <tbody> <tr> <td></td> <td>Other</td> <td>3</td> <td>\$213,724.40</td> <td>0</td> <td>\$0.00</td> <td>3</td> <td>\$213,724.40</td> </tr> <tr> <td></td> <td>Totals for</td> <td>3</td> <td>\$213,724.40</td> <td>0</td> <td>\$0.00</td> <td>3</td> <td>\$213,724.40</td> </tr> <tr> <td></td> <td>Other</td> <td>16</td> <td>\$1,882,740.38</td> <td>0</td> <td>\$0.00</td> <td>16</td> <td>\$1,882,740.38</td> </tr> <tr> <td></td> <td>Totals for</td> <td>16</td> <td>\$1,882,740.38</td> <td>0</td> <td>\$0.00</td> <td>16</td> <td>\$1,882,740.38</td> </tr> <tr> <td></td> <td>Other</td> <td>1</td> <td>\$86,727.00</td> <td>0</td> <td>\$0.00</td> <td>1</td> <td>\$86,727.00</td> </tr> <tr> <td></td> <td>Totals for</td> <td>1</td> <td>\$86,727.00</td> <td>0</td> <td>\$0.00</td> <td>1</td> <td>\$86,727.00</td> </tr> <tr> <td></td> <td>Other</td> <td>67</td> <td>\$17,773,127.17</td> <td>8</td> <td>\$3,317,704.35</td> <td>75</td> <td>\$21,090,831.52</td> </tr> </tbody> </table>	Vendor workload as primes and subcontractors, by function and type, between 09/16/2013 and 08/21/2014										All Projects				All Regions		Vendor		Number of Prime Projects	Prime Contract Total Cost	Number of Subcontracts	Subcontract Total Cost	Total Projects	Total Contract Cost		Other	3	\$213,724.40	0	\$0.00	3	\$213,724.40		Totals for	3	\$213,724.40	0	\$0.00	3	\$213,724.40		Other	16	\$1,882,740.38	0	\$0.00	16	\$1,882,740.38		Totals for	16	\$1,882,740.38	0	\$0.00	16	\$1,882,740.38		Other	1	\$86,727.00	0	\$0.00	1	\$86,727.00		Totals for	1	\$86,727.00	0	\$0.00	1	\$86,727.00		Other	67	\$17,773,127.17	8	\$3,317,704.35	75	\$21,090,831.52
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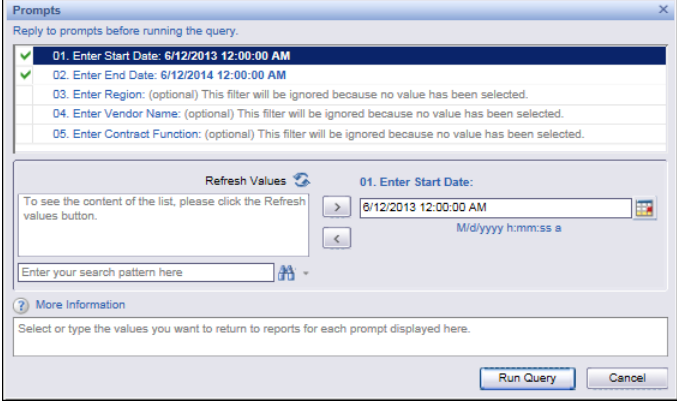
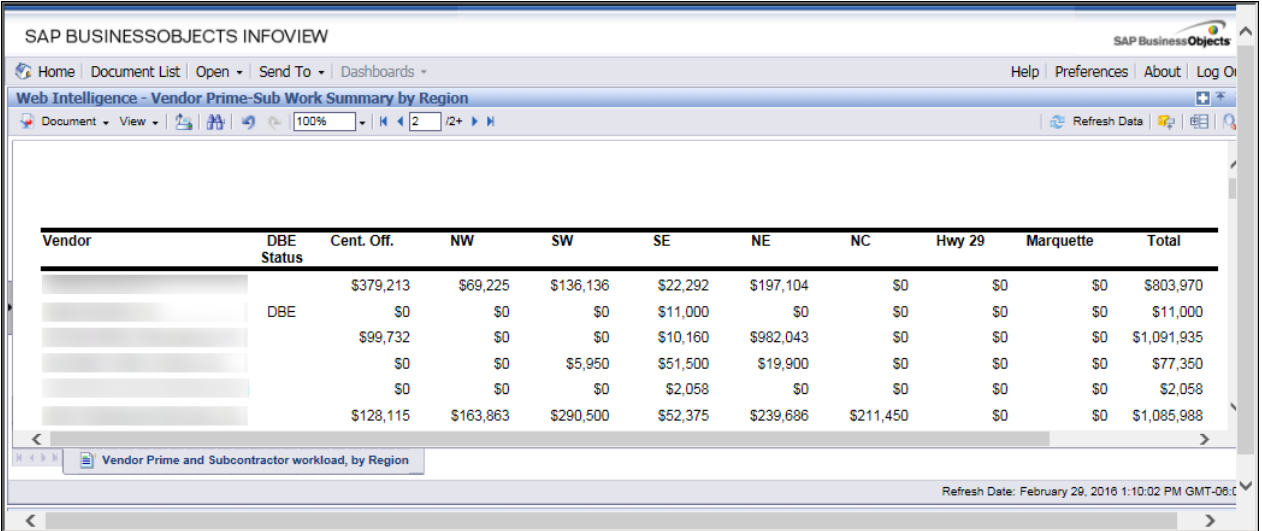


Report	Description	Prompt and Results Dialog Box Images																														
<p>Vendor Prime_Sub Work Multi Yrs by Amt</p>	<p>Summarizes approved prime and sub workload by firm. Includes costs of approved contracts by fiscal year.</p> <p>Prompts - start and end dates are required; region, vendor name and contract function are optional:</p> <ul style="list-style-type: none"> • Start date - start date of the date range • End date - end date of the date range • Region • Vendor Name • Contract Function 	  <table border="1" data-bbox="762 889 1465 1076"> <thead> <tr> <th>Firm</th> <th>DBE Status</th> <th>FY 2015</th> <th>FY 2016</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>\$946,958</td> <td>\$8,793,460</td> <td>\$9,740,418</td> </tr> <tr> <td></td> <td>DBE</td> <td>\$1,228,426</td> <td>\$5,825,779</td> <td>\$7,054,205</td> </tr> <tr> <td></td> <td></td> <td>\$338,149</td> <td>\$4,726,606</td> <td>\$5,064,755</td> </tr> <tr> <td></td> <td></td> <td>\$1,175,564</td> <td>\$3,360,883</td> <td>\$4,536,446</td> </tr> <tr> <td></td> <td></td> <td>\$1,013,234</td> <td>\$3,408,166</td> <td>\$4,421,399</td> </tr> </tbody> </table>	Firm	DBE Status	FY 2015	FY 2016	Total			\$946,958	\$8,793,460	\$9,740,418		DBE	\$1,228,426	\$5,825,779	\$7,054,205			\$338,149	\$4,726,606	\$5,064,755			\$1,175,564	\$3,360,883	\$4,536,446			\$1,013,234	\$3,408,166	\$4,421,399
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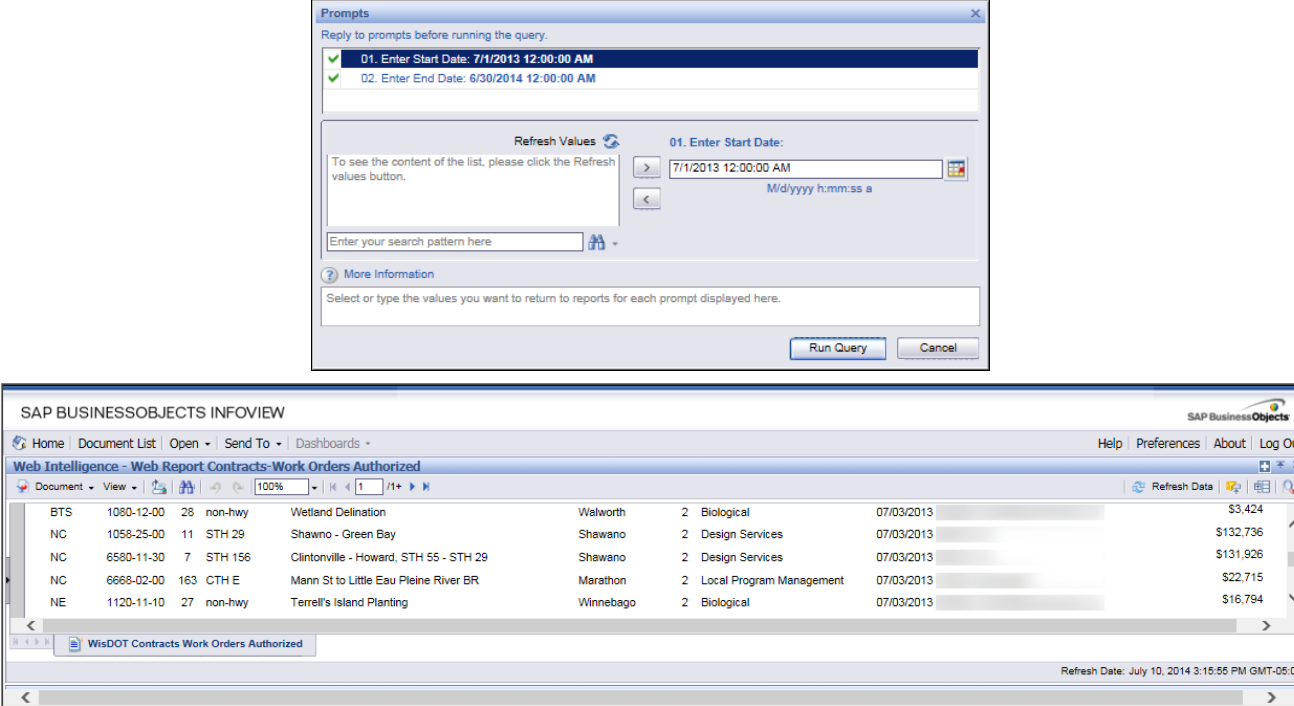


Report	Description	Prompt and Results Dialog Box Images																																																	
<p>Vendor Prime_Sub Work Summary</p>	<p>Summarizes a firm's workload as both prime and sub. Includes contracts/work orders not approved.</p> <p>Prompts - start and end dates are required; region, vendor name and contract function are optional:</p> <ul style="list-style-type: none"> • Start date - start date of the date range • End date - end date of the date range • Region • Vendor Name • Contract Function 	 <p>The Prompts dialog box contains the following prompts:</p> <ul style="list-style-type: none"> 01. Enter Start Date: 5/20/2009 12:00:00 AM 02. Enter End Date: 5/9/2013 12:00:00 AM 03. Enter Region: (optional) This filter will be ignored because no value has been selected. 04. Enter Vendor Name: (optional) This filter will be ignored because no value has been selected. 05. Enter Contract Function: (optional) This filter will be ignored because no value has been selected. <p>The '01. Enter Start Date:' prompt is expanded to show a date input field with the value '5/20/2009 12:00:00 AM' and a 'Refresh Values' button.</p>																																																	
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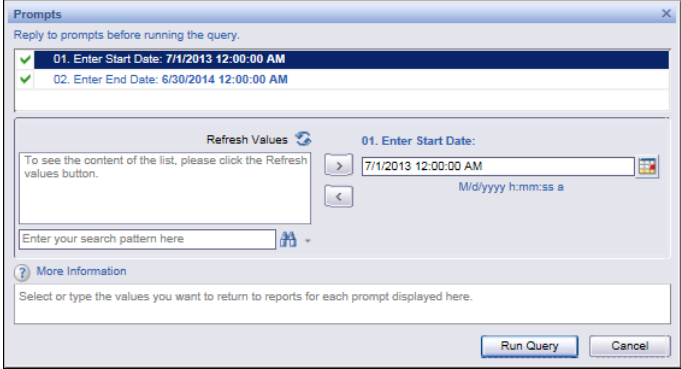
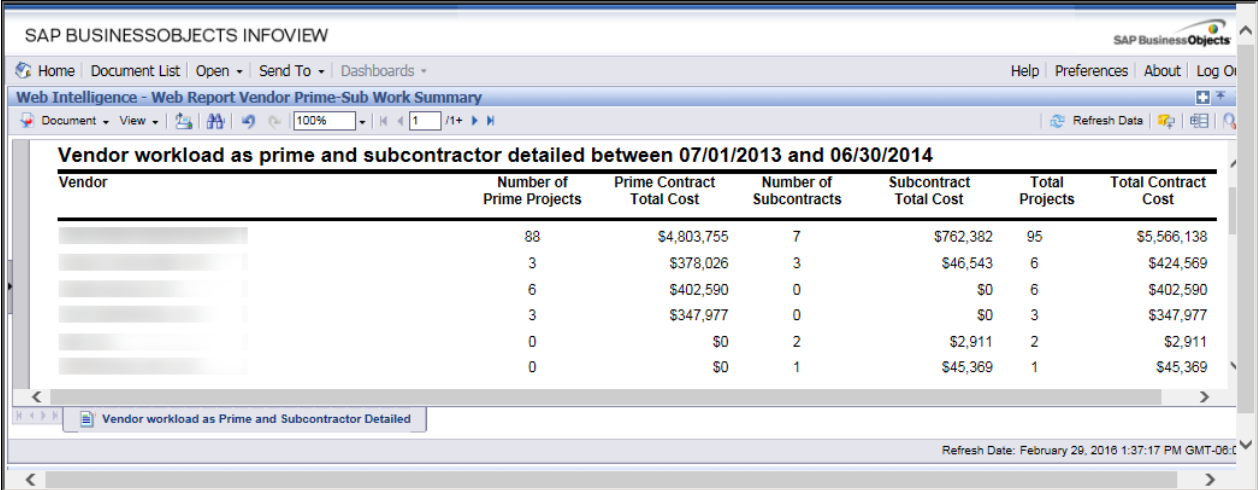


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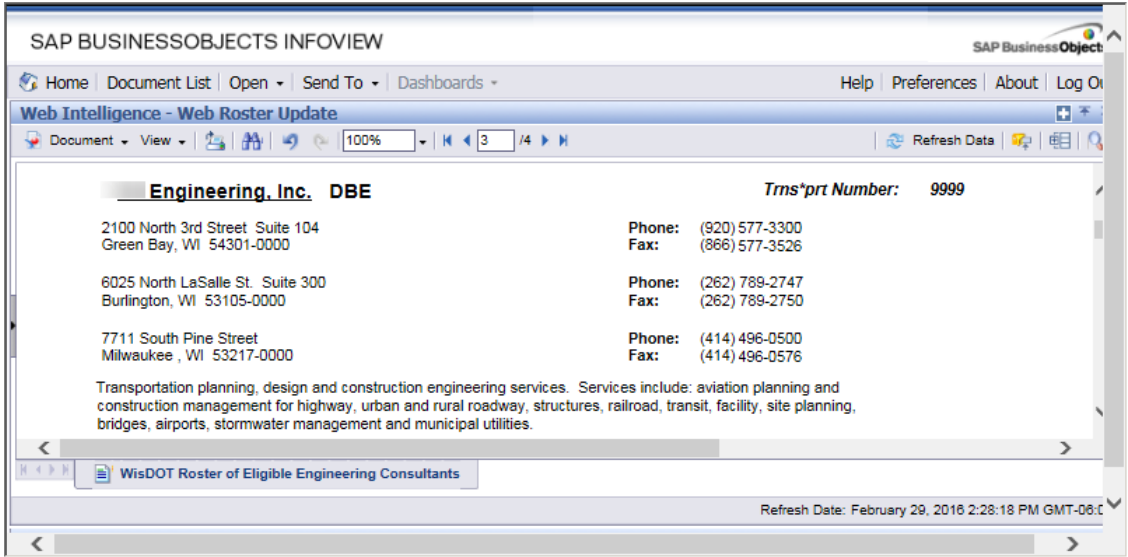


Report	Description	Prompt and Results Dialog Box Images																																				
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<u>Report</u>	<u>Description</u>	<u>Prompt and Results Dialog Box Images</u>
Web Roster Update	Detailed list of vendor firms on the WisDOT Roster of Eligible Engineering Consultants. Provides DBE status, addresses, phone numbers and a synopsis of skills. No prompts.	

Documentation

<u>Document</u>	<u>Type and Description</u>
Firm Email Distribution List	Web Intelligence Report. Lists email addresses for contacts of consultant firms.
Setting Automatic Folder Navigation	Microsoft Word. Provides instructions to have SAP Business Objects automatically open the CARS folder when the user clicks BO Reports on the CARS menu.



APPENDIX 8 Sample Invoices in CARS and PDF of Submitted Invoice

View Invoice
Back to Dashboard
Back to Contract
Delete Invoice
View Paid Invoices

Contract Invoice Information

Contract Invoice Information
 Consultant Name: Ames Enterprises
 FEIN/Loc: 5555555550
 State Project ID: 2375-07-00
 Project Description: Puetz Rd - Forest Hill Ave
 PO Number: 1815
 Master Contract ID: M06972098
 Work Order: 20
 County: Milwaukee
 Consultant Project Manager: Alyssa Barretto
 Status: Draft
 Status Date: 04/30/2015

Final Invoice: No
 Consultant Invoice Number: 123
 Time Period Covered by this Invoice:
 Start Date: 04/01/2015
 End Date: 04/02/2015
 Consultant Contact:
 Name: Felicity Schreiber
 Phone: 907-567-6876
 Email: ready@ames.com

[Edit](#)

Actual Cost

DBE: No, OH Rate: Home Office, Function: Environmental Services

Actual Costs

Inurred This Invoice:	0.00
Previously Incurred:	0.00
Inurred to Date:	0.00
Contract Maximum:	3,837.92
Subject to Maximum:	0.00
Previously Paid:	0.00
Actual Cost Due:	0.00

Fixed Fee

Earned to Date:	0.00
Contract Maximum:	245.15
Subject to Maximum:	0.00
Previously Paid:	0.00
Fixed Fee Due:	0.00
Due This Line Item:	0.00

Total Actual Cost Due: \$0.00

Sub Consultant Invoices

Total Sub Invoices Included: \$0.00

Summary

Total DBE Cost This Invoice:	0.00
Total Non-DBE Cost This Invoice:	0.00
Total Due This Invoice:	\$0.00
Total Contract Maximum:	4,083.07
Previously Paid:	0.00
Remaining Agreement Balance:	4,083.07

Contract Paid Summary

Total DBE Cost:	\$0.00
Total Non-DBE Cost:	\$4,083.07
Prime Contract Maximum:	\$4,083.07
Sub Contract Maximum:	\$0.00
Amel Sub Contract Maximum:	\$0.00
Total Contract Maximum:	\$4,083.07
Previously Paid on Contract:	\$0.00
Remaining Agreement Balance:	\$4,083.07

Upload Documents

Upload Documents

No items found. 1

Document Description	Created Date
Nothing found to display.	

No items found. 1

Consultant Certification

I certify that to the best of my knowledge the work as listed has been completed, represents no duplication of payments, and that all costs are in compliance with the contract terms.

[Submit Invoice](#)

Draft Actual Cost Invoice with No Costs Added (Before Edit)





[View Paid Invoices](#)

[Back to Contract](#)

[Back to Dashboard](#)

View Invoice

[Contract Invoice Information](#)

Consultant Name: Osage & Co.	FEIN/LOC: 999999999/0	PO Number: 1668	Invoice ID: 1668
State Project ID: 0874-00-01	Master Contract ID: M05410000	Work Order: 1	Status: Submitted
Project Description: non-hwy	County: Various	Contract Project Manager: JC Lane	Status Date: 04/23/2015
Final Invoice: No	Consultant Invoice Number: OS-LS-1-1		

Time Period Covered by this Invoice:
 Start Date: 03/01/2015
 End Date: 03/31/2015

Consultant Contact:
 Name: Sara
 Phone: 987-987-9874
 Email: sara

Lump Sum
 DBE: Yes, OH Rate: Home Office, Function: Training Services [View Details](#)

Earned to Date: 160,000.00
 Contract Maximum: 1,000,000.00
 Subject to Maximum: 160,000.00
 Previously Paid: 0.00
 Due This Line Item: 160,000.00

Total Lump Sum Due: \$160,000.00

Sub Consultant Invoices

3 items found, displaying all items. 1

Invoice Type	Vendor Name	DOT Invoice ID	Invoice Total
S	Acme Inc.	1649	44,250.00
CM	Able Engineering	1663	50,000.00
A	Axel Construction	1630	30,000.00

Total Sub Invoices Included: \$124,250.00

Summary

Total DBE Cost This Invoice: 160,000.00
 Total Non-DBE Cost This Invoice: 0.00

Total Due This Invoice: \$284,250.00

Total Contract Maximum: 1,000,000.00
 Previously Paid: 0.00
 Remaining Agreement Balance: 1,000,000.00

Contract Paid Summary

Total DBE Cost: \$1,150,000.00
 Total Non-DBE Cost: \$450,000.00

Prime Contract Maximum: \$1,000,000.00
 Sub Contract Maximum: \$450,000.00
 Amend Sub Contract Maximum: \$150,000.00

Total Contract Maximum: \$1,600,000.00
 Previously Paid on Contract: \$0.00
 Remaining Agreement Balance: \$1,600,000.00

Upload Documents

One item found. 1

Document Description	Created Date
Submitted Partial Invoice	April 23, 2015 07:02:50

One item found. 1

Consultant Certification

I certify that to the best of my knowledge the work as listed has been completed, represents no duplication of payments, and that all costs are in compliance with the contract terms.

Submitted By: Sara Reed

Submitted Lump Sum Invoice with Subcontractor Invoices Included



[Back to Dashboard](#)
[Back to Contract](#)
[View Paid Invoices](#)

View Invoice

Contract Invoice Information

Consultant Name: Osage & Co.	PO Number: 1668	Invoice ID: 1668
State Project ID: 0874-00-01	Master Contract ID: M05410000	Work Order: 1
Project Description: non-hwy	County: Various	Contract Project Manager: JC Lane
Final Invoice: No	Consultant Invoice Number: OS-LS-1-1	Status Date: 04/30/2015
Time Period Covered by this Invoice:		
Start Date: 03/01/2015	End Date: 03/31/2015	
Consultant Contact:		
Name: Sara	Phone: 987-987-9874	Email: sara

Lump Sum

DBE: Yes, OH Rate: Home Office, Function: Training Services [View Details](#)

Earned to Date: 160,000.00

Contract Maximum: 1,000,000.00

Subject to Maximum: 160,000.00

Previously Paid: 0.00

Due This Line Item: 160,000.00

Total Lump Sum Due: \$160,000.00

Sub Consultant Invoices

3 items found, displaying all items. 1

Invoice Type	Vendor Name	DOT Invoice ID	Invoice Total
S	Acme Inc.	1649	44,250.00
CM	Able Engineering	1653	50,000.00
A	Axel Construction	1630	30,000.00
Total Sub Invoices Included:			\$124,250.00

Summary

Total DBE Cost This Invoice: 160,000.00

Total Non-DBE Cost This Invoice: 0.00

Total Due This Invoice: \$284,250.00

Total Contract Maximum: 1,000,000.00

Previously Paid: 0.00

Remaining Agreement Balance: 1,000,000.00

Contract Paid Summary

Total DBE Cost : \$1,150,000.00

Total Non-DBE Cost : \$450,000.00

Prime Contract Maximum : \$1,000,000.00

Sub Contract Maximum : \$450,000.00

Amdt Sub Contract Maximum : \$150,000.00

Total Contract Maximum : \$1,600,000.00

Previously Paid on Contract : \$271,750.00

Remaining Agreement Balance : \$1,328,250.00

Upload Documents

One item found. 1

Document Description	Created Date
Paid Partial Invoice	April 30, 2015 13:35:57

One item found. 1

Consultant Certification

I certify that to the best of my knowledge the work as listed has been completed, represents no duplication of payments, and that all costs are in compliance with the contract terms.

Submitted By: Sara Reed

Approved By: JC Lane

Paid Lump Sum Invoice

Field Worker	3 - 2015	Jonny Parker	P212	Field Office	Hours Worked	40.0	\$850.00
	3 - 2015	Javier Mendez	M876	Field Office	Hours Worked	40.0	\$850.00
		Total Field Worker				80.0	\$1,700.00
Office Clerk	3 - 2015	Martina Salazar	S434	Home Office	Hours Worked	40.0	\$750.00
		Total Office Clerk				40.0	\$750.00
Project Manager	2 - 2015	Veronica Spencer	S467	Home Office	Hours Worked	40.0	\$1,250.00
		Total Project Manager				40.0	\$1,250.00
		Total Labor					\$3,700.00

Direct Labor Detail by Activity - Actual Cost

Activity	Month-Year	Employee Name	Employee Number	Indirect Cost Rate Type	Premium Pay Hrs	Pay Hrs	Direct Labor Cost
General Field Work	3 - 2015	Jonny Parker	P212	Field Office	Hours Worked	40.0	\$850.00
	3 - 2015	Javier Mendez	M876	Field Office	Hours Worked	40.0	\$850.00
		Total General Field Work				80.0	\$1,700.00
General Office Work	3 - 2015	Martina Salazar	S434	Home Office	Hours Worked	40.0	\$750.00
		Total General Office Work				40.0	\$750.00
Project Supervision	2 - 2015	Veronica Spencer	S467	Home Office	Hours Worked	40.0	\$1,250.00
		Total Project Supervision				40.0	\$1,250.00
		Total Labor					\$3,700.00

Direct Labor Summary - Actual Cost

Month-Year	Indirect Cost Rate Type	Premium Pay Hrs	Pay Hrs	Direct Labor Cost
2 - 2015	Home Office	Hours Worked	40.0	\$1,250.00
		Sub Total		\$1,250.00
3 - 2015	Field Office	Hours Worked	40.0	\$850.00
3 - 2015	Field Office	Hours Worked	40.0	\$850.00
		Sub Total		\$1,700.00
3 - 2015	Home Office	Hours Worked	40.0	\$750.00
		Sub Total		\$750.00
		Total Summary		\$3,700.00

Direct Costs - Actual Cost

Date	Dct Cost Category	Dct Cost Desc	Dct Cost Payment	Dct Cost Name	Dct Cost Indirect Cost Rt Ty	Units	Unit Desc	Rate	Dct Cost Cost
3 - 2015	Per Diem	Lodging and Meals	Payment	Veronica Spencer		4.0	Days	120.0	\$480.00
				Sub Total					\$480.00
				Total Summary					\$480.00

Indirect Costs - Actual Cost

Date	Indirect Desc	Indirect Cost Rt Type	Costs	Indirect Cost Rate	Indirect Cost
2 - 2015	Calculated Labor Cost	Home Office	\$1,250.00	1.85	\$2,312.50
		Sub Total			\$2,312.50
3 - 2015	Calculated Labor Cost	Field Office	\$1,700.00	1.825	\$3,102.50
		Sub Total			\$3,102.50
3 - 2015	Calculated Labor Cost	Home Office	\$750.00	1.85	\$1,387.50
		Sub Total			\$1,387.50
		Total Summary			\$6,802.50

Fixed Fee - Actual Cost

DOT Invoice No	Fixed Fee Amount	Percent Complete	Paid Prior Invoices	Earned to Date	Amount due this Invoice
1245	\$25,000.00	20.00%	\$0.00	\$5,000.00	\$5,000.00
	Total Fixed Fee		\$0.00		\$5,000.00

Summary of Total Invoice - Actual Cost

Firm	Subconsultant to	Cost
Osage & Co.		\$10,982.50



Summary of Total Invoice - Specific Rate		
Firm	Subconsultant to	Cost
Osage & Co.		\$0.00

Consultant Certification

I certify that to the best of my knowledge the work as listed has been completed, represents no duplication of payments, and that all costs are in compliance with the contract terms.

Submitted by : J User

Supporting Documents	
Document Description	Created Date
Progress Report	Tue Mar 17 12:46:59 CDT 2015

PDF of Submitted Invoice - Page 3 of 3 (not including attachments)



APPENDIX 9 Invoice Sections

Invoice Sections Overview

All invoices have 5 sections in common:

- Contract Invoice Information
- Sub Consultant Invoices
- Summary
- Consultant Certification
- Upload Documents

There are also sections for each basis of payment in the contract. The type and number of sections depends on how many basis of payment types are in the contract. For example, if the contract is paid based on a lump sum, the only section on the invoice will be a lump sum section. These cost sections may include:

- Actual Cost
- Cost Per Unit
- Lump Sum
- Specific Rate



Contract Invoice Information Section - continued


The **Contract Invoice Information** section shows key contract information and the invoice contact information entered with the instructions in *Create New Invoice* on page 69.

1. Key contract information appears at the top of the page. The contract information is not editable.
2. The number in the **Invoice ID** field is the DOT Invoice ID, which is a unique number CARS assigns to this invoice. This identifier is one of three invoice search parameters, along with **State Project ID** and **Consultant Invoice Number**.
3. Consultant information entered when creating the invoice appears at the bottom of this section.
4. Click **Edit** to update the invoice contact information.

Contract Invoice Information

1		2	
Consultant Name: Osage	FEIN/Loc: 987654321/0	PO Number:	Invoice ID: 586
State Project ID: 0751-32-58	Master Contract ID:	Work Order:	Status: Draft
Project Description: county line	County: Clark	Contract Project Manager:	Status Date: 07/25/2014

3		
Final Invoice: No	Consultant Invoice Number: 73 MTC 5-14	
Time Period Covered by this Invoice:		
Start Date: 05/01/2014	End Date: 05/31/2014	
Consultant Contact:		
Name: Felicity Schreiber	Phone: 608-811-4597	Email: fschreiber@osage.com

4 



Sub Consultant Invoices Section

The **Sub Consultant Invoices** section appears in all invoices, but its appearances varies based on whether there are subcontracts associated with the contract.

An empty section appears if there are no subcontracts.

A field and buttons are added when there are subcontracts.

Summary Section

The **Summary** section shows the total costs billed on this invoice, the totals for the available funds for this contract, paid amount, and remaining available funds.

Consultant Certification Section

1. The **Consultant Certification** section contains a statement asserting that the work being billed is complete and that all billed costs comply with the contract terms.
2. Click **Submit Invoice** to send the invoice to the next step in payment processing.
3. When the invoice is submitted, the submitters name appears after the certification statement.

Sub Consultant Invoices	
Total Sub Invoices Included:	\$0.00

Sub Consultant Invoices	
<input type="text" value="-Select-"/>	<input type="button" value="Create Invoice"/> <input type="button" value="Accept/Include Invoices"/>
Total Sub Invoices Included:	\$0.00

Summary		
Total DBE Cost This Invoice:	0.00	
Total Non-DBE Cost This Invoice:	0.00	
Total Due This Invoice:		0.00
Total Contract Maximum:	62400.00	
Previously Paid:	0.00	
Remaining Agreement Balance:	62400.00	

Consultant Certification	
1	I certify that to the best of my knowledge the work as listed has been completed, represents no duplication of payments, and that all costs are in compliance with the contract terms.
2	<input type="button" value="Submit Invoice"/>

Consultant Certification	
I certify that to the best of my knowledge the work as listed has been completed, represents no duplication of payments, and that all costs are in compliance with the contract terms.	
3	Submitted By: Tom Bane



Sub Consultant Invoices

The **Sub Consultant Invoices** section contains tools used to include invoices sent by sub consultants or to create invoices on the sub consultant firm's behalf.

1. Select the sub consultant firm.
2. Click **Create Invoice** to create an invoice for this sub consultant.
3. Click **Accept/Include Invoices** to review and include the invoiced sub consultant costs with your firm's invoice, or reject the sub consultant invoice.
4. CARS shows the total of sub consultant invoices you have accepted and included with your firm's invoice.

The screenshot displays the 'Sub Consultant Invoices' section. At the top, there is a dropdown menu labeled '1' with '-Select-' as the current selection. To its right are two buttons: '2 Create Invoice' and '3 Accept/Include Invoices'. Below these elements is a summary row labeled '4' showing 'Total Sub Invoices Included: \$0.00'.

Actual Cost Section

The **Actual Cost** section shows cost details for direct labor, overhead, indirect costs, and fixed fees. Each cost accounting block begins with a description, and there is an edit button that applies to this block. If there is more than one actual cost entered in the contract, the accounting block will be repeated for each cost item, and each block will have its own **Edit** button. Click **Edit** to enter or review the cost details. The **Due This Line Item** and **Total Actual Cost Due** amounts are the sum of **Actual Cost Due** and **Fixed Fee Due**. See *Cost Per Unit* on page 237 for an example of multiple accounting blocks.

Fixed fees are paid by percentage of work completed. The percentage complete (progress) should be calculated using one of the following formulas:

$$\frac{\text{Total Direct Labor Invoiced} + \text{Total Overhead Invoiced}}{\text{Total Estimated Contract Direct Labor} + \text{Total Estimated Contract Overhead}} \times 100\%$$

OR

$$\frac{\text{Total Direct Labor Invoiced}}{\text{Total Estimated Contract Direct Labor}} \times 100\%$$

The columnar format groups the information to make it easier to see how the costs are being calculated. Actual costs are totaled at the bottom of each section.

If the invoice is in "Draft" status, click **Edit** to add to or change the cost information. If the invoice has been submitted, the **View Details** button replaces the **Edit** button.



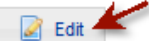
Actual Cost Section - continued

Accounting Block Line Item Descriptions

<u>Line Item</u>	<u>Description</u>
Incurred This Invoice	Total of this type of costs as described in the details
Previously incurred	Amount previously invoices, not including fixed fees
Incurred to Date	Total costs incurred for this contract
Contract Maximum	Total amount available per the contract terms, including original costs and amendments
Subject to Maximum	Amount of the incurred costs that are limited by the contract maximum
Previously Paid	Amount previously paid that is limited by the contract maximum
Actual Cost Due	Total amount of incurred costs payable under contract terms. Calculated as lesser of contract max or incurred to date, minus previously paid

Fixed Fee Block Line Item Descriptions

<u>Line Item</u>	<u>Description</u>
Earned to Date	Total fixed fee for original costs and amendments
Contract Maximum	Total amount available per the contract terms, including original costs and amendments
Subject to Maximum	Amount of the fees that are limited by the contract maximum
Previously Paid	Amount previously paid for this contract


Actual Cost
 DBE: No, OH Rate: Home Office, Function: Traffic Engineering Services 

Actual Costs			
Incurred This Invoice:	80.00		
Previously Incurred:	825.00		
Incurred to Date:	905.00		
Contract Maximum:	18535.00		
Subject to Maximum:		905.00	
Previously Paid:		825.00	
Actual Cost Due:		80.00	
Fixed Fee			
Earned to Date:	0.00		-
Contract Maximum:	0.00		
Subject to Maximum:		0.00	
Previously Paid:		0.00	
Fixed Fee Due:		0.00	
Due This Line Item:			80.00
Total Actual Cost Due:			80.00




Cost Per Unit Section

Cost per unit accounting blocks are arranged like actual cost blocks. When the contract has multiple costs per unit, the **Cost Per Unit** section has one accounting block per cost. Click **Edit** to enter or review the cost details for a cost block.

Cost Per Unit	
DBE: No, OH Rate: Field Office, Function: Traffic Counts 	
Incurring This Invoice:	0.00
Previously Incurred:	0.00

Incurring to Date:	0.00
Contract Maximum:	3913.00
Subject to Maximum:	0.00
Previously Paid:	0.00

Cost Per Unit Due:	0.00

DBE: No, OH Rate: Home Office, Function: Traffic Analysis Services 	
Incurring This Invoice:	0.00
Previously Incurred:	0.00


Incurring to Date:	0.00
Contract Maximum:	3700.00
Subject to Maximum:	0.00
Previously Paid:	0.00

Cost Per Unit Due:	0.00

Total Cost Per Unit Due:	0.00
--------------------------	------

Specific Rate Section

Specific rate accounting blocks are arranged like actual cost blocks. If there is more than one specific rate entered in the contract, the accounting block will be repeated for each cost item, and each block will have its own **Edit** button. Click **Edit** to enter or review the cost details.

Specific Rate	
DBE: No, OH Rate: Field Office, Function: Mapping Services 	
Incurring This Invoice:	0.00
Previously Incurred:	0.00

Incurring to Date:	0.00
Contract Maximum:	7174.00
Subject to Maximum:	0.00
Previously Paid:	0.00

Specific Rate Due:	0.00

Total Specific Rate Due:	0.00
--------------------------	------



Lump Sum Section

Lump Sum	
DBE: No, OH Rate: Home Office - Defaulted, Function: Construction Technical Expert View Details	
Earned to Date:	0.00
Contract Maximum:	40800.00
Subject to Maximum:	0.00
Previously Paid:	0.00

Due This Line Item:	0.00
Total Lump Sum Due:	0.00

Lump sum accounting blocks are arranged like fixed fee blocks. Costs are paid by percentage of work completed. The percentage complete (progress) should be calculated using one of the following formulas:

$$\frac{\text{Total Direct Labor Invoiced} + \text{Total Overhead Invoiced}}{\text{Total Estimated Contract Direct Labor} + \text{Total Estimated Contract Overhead}} \times 100\%$$

OR

$$\frac{\text{Total Direct Labor Invoiced}}{\text{Total Estimated Contract Direct Labor}} \times 100\%$$



WisDOT: Approver/Reviewer Section

WisDOT uses this section when reviewing and approving invoices. When there is a two-stage review, the person with the Invoice Reviewer role marks the invoice as reviewed. Then the approver can complete the final review and approve the invoice. If the invoice is rejected, the rejection reason must be included. Notification is sent to the contractor when an invoice is rejected.

Approver/Reviewer

Rejected Reason: _____



APPENDIX 10 Sample Evaluation

Back To Dashboard
Edit
Print Page

View Evaluation

[Contract Information](#)

Contract Number: 1400006269

Evaluation Number: 3

Vendor: BC Enterprises

[Evaluation Information](#)

Percent Work Completed: 10.0

Full Scope? Yes

Evaluation Function: Construction

Evaluation Period From: 04/23/2014 To: 05/01/2014

Evaluation Status History:

- 05/01/2014 - Ready for Review
- 05/01/2014 - PM Created

[Evaluation Details](#)

Overall Evaluation Rating: 3.0

Reviewer - Consultant: Post Ken

Evaluator - WISDOT: User J

Eval PDF File

Comments and Summation

Describe strengths / weaknesses and provide suggestions for improvement.

Overall Evaluator Comments:

Overall Reviewer Comments:

Would you have reservation selecting this firm again for this type of project? No

Was this Evaluation done at a face-to-face meeting? No

Discussion Location / Date:

[Categories and Rating](#)

1) Project Management

Rating: 3.0

Question & Answers

Was the consultant project manager/leader in control of the services provided to WIDOT? **Satisfactory**

Was the communication between the consultant project manager/leader and the Department staff adequate? **Satisfactory**

Was the coordination with subconsultants and others involved in the project adequate? **Satisfactory**

Did the consultant minimize staffing when possible? **Satisfactory**

Did the consultant project manager/leader assign appropriate staff to the services? **Satisfactory**

Was qualified staff available when needed? **Satisfactory**

Evaluator Comments:

Reviewer Comments:

4) Quality Of Work

Rating: 3.0

Question & Answers

Were errors or omissions numerous, serious, significant or costly? **Satisfactory**

Were project records (diaries, finals, IRA\MCT, etc) accurate, complete and easy to follow? **Satisfactory**

Does the work reflect compliance with Department procedures, construction manuals and requirements? **Satisfactory**

Evaluator Comments:

Reviewer Comments:

Sample Evaluation, Page 1





2) Human Relations

Rating: 3.0

Question & Answers

- Was it easy to work with consultant? **Satisfactory**
- Was consultant courteous and helpful in dealing with property owners, the general public and agencies? **Satisfactory**
- Did consultant react well to criticism? **Satisfactory**
- Was consultant responsive to requests from the Department? **Satisfactory**
- Was consultant cooperative? **Satisfactory**
- Did the consultant properly represent WIDOT? **Satisfactory**
- Did the consultant promote a good working relationship with the contractor? **Satisfactory**

Evaluator Comments:
Reviewer Comments:

3) Technical Skills

Rating: 3.0

Question & Answers

- Did the consultant provide adequate materials inspection and testing? **Satisfactory**
- Did consultant work require more than necessary WIDOT assistance? **Satisfactory**
- Did the consultant demonstrate adequate survey skills? **Satisfactory**
- Did consultant provide adequate erosion control inspection? **Satisfactory**
- Were inspectors active and assertive in their inspection duties or were they just "observers"? **Satisfactory**
- Did the consultant use sound judgment regarding adhering to the specifications or take correct actions **Satisfactory**
- Did the consultants inspection work reflect adequate level of experience and training? **Satisfactory**
- Did consultant demonstrate sound judgment of traffic control and public safety? **Satisfactory**

Evaluator Comments:
Reviewer Comments:

6) Timeliness

Rating: 3.0

Question & Answers

- Did the consultant submit reports, pay estimates and CCOs in a timely manner? **Satisfactory**
- Did consultant make decisions in a timely manner? **Satisfactory**
- Did consultant keep the Department informed of project work? **Satisfactory**
- Did consultant effectively work with the contractor in coordinating the utility and other work by local agencies? **Satisfactory**
- Did consultant submit complete finals and materials report within the timeframe specified in the contract? **Satisfactory**
- Did consultant coordinate their services with contractors work in a timely manner? **Satisfactory**

Evaluator Comments:
Reviewer Comments:
yes

5) Cost Control

Rating: 3.0

Question & Answers

- Did the consultant minimize contractor overruns and/or change orders when possible? **Satisfactory**
- Was the consultant creative in controlling their own costs and developing efficiencies? **Satisfactory**
- Did project result in the expenditure of reasonable time as defined or scoped? **Satisfactory**

Evaluator Comments:
Reviewer Comments:

APPENDIX 11 Expenditure Accounting Instructions

Expenditure Accounting Processes

Expenditure Accounting staff members are responsible for two processes in CARS:

- Checking contract documents and contract records to verify information in PeopleSoft when approving new requisitions in PeopleSoft
- Viewing invoices in CARS for approval in PeopleSoft

This chapter describes both of these processes, but includes the basic process of searching for a contract in CARS, which is essential to the process.

Users who have the *Expenditure Accounting* role are granted limited access to contracts in CARS. They must access contracts through the **Financial** link on the **Search** menu. They also have limited access to invoices, but can access them through the links on the *Dashboard* page or from the **Invoice** command on the **Search** menu.

Journal Vouchers

Journal voucher (JV) contracts (as described in the Facilities Development Manual (FDM) in [chapter 8, section15-2](#)) are paid like invoices for other projects in CARS, typically as master contracts and work orders. Form [DT1511](#) is required for JV contracts and must be included in the invoice documentation.

Note: Page 2 of form DT1511 is now optional. Page 1 is still required.

JV projects use a “dummy” project ID in the Transportation Interactive Procurement System (TIPS) against which costs cannot be invoiced. In CARS, the invoices are paid on the projects listed on the DT1511 in the *Cost Distribution by Project ID* area.



View Uploaded Contract Documents

As of July 2016, contract documents will be uploaded into CARS. Paper copies will continue to be stored in Central Files and sent to consultants and municipalities, but regions and bureaus will no longer retain hard copies. WisDOT users may view contract documents directly in CARS on the View Contract. Only users with the CARS Administrator role may upload and manage contract documents.

Contract documents stored as PDF files in CARS are named according to a naming convention. The file name contains the following components, in order:

1. Project ID
2. Master contract ID
3. "WO" + work order number
4. CARS contract number
5. Authorization date as YYYYMM
6. Document type identifier

Contract documents are divided into four types of content for future security segregation. Document identifiers indicate the content of the PDF and include the following:

Document Type	Content	Identifier
Contract	Contract pages, including subcontracts and amendments	C
DBE	DBE forms	D
Fee Comp	Fee Compensation details	F
WisDOT	DT25 forms, signature pages, authorization letters	W
Amendment Contract	Amendment contract pages, including subcontracts	CA + amendment number
Amendment DBE	Amendment DBE forms	DA + amendment number
Amendment Fee Comp	Amendment fee Compensation details	FA + amendment number
Amendment WisDOT	Amendment DT25 forms, signature pages, authorization letters	WA + amendment number

Regular contract file names do not contain master contract and work order number. Master contract file names do not contain work order numbers

Examples:

Contract document (DBE)	10170033-823051017-20050826-D
Contract Amendment 1	10170033-823051017-20050826-FA1
Master Contract	16460701-M10005555-606025555-20030331-C
Work Order	16460701-M10005555-WO2-606025555-20030331-W



WisDOT: View Contract Uploaded Documents

5. Search for and open the contract or work order as described in [Search Contracts](#) on page 26.
6. Expand the **Uploaded Documents** section at the top of the page.
7. Click the hyperlink for the appropriate document. CARS opens the PDF in the same window.
8. The Acrobat toolbar appears mid-page. Use these controls to perform the following actions:
 - a. Save
 - b. Print
 - c. Zoom
 - d. Turn off the toolbar
9. Use the scroll bar to move the view within the PDF.
10. Click **Back** to return to the CARS *View Contract* page.

View Work Order [← Back to Search Results](#) [Create Invoice](#) [Import Invoice](#) [View Evaluation](#) [New Evaluation](#) [Edit](#)

[Delete](#) [Print Page](#) [Favorite](#) [Go to Bottom](#)

2 [WorkOrder Uploaded Documents](#)

One item found. 1

File Name	WorkOrder No	Amendment No	Document Description	Created Date
3 90060300-M06959312-WO202-115119501-20141024-C.pdf	202		Contract	June 14, 2016 12:35:50

One item found. 1

[Master Contract Reports](#)

3 [Master Information](#)

Master Contract ID: M06959312	Contract Number : 115119501	Master Contract Group Info
---	---------------------------------------	-----------------------------------

View Contract Document

Contract No: 115119501
Document Type Description: Contract
Created Date: Tue Jun 14 12:35:50 CDT 2016

This file claims compliance with the PDF/A standard and has been opened read-only to prevent modification. [Enable Editing](#)

a **b** **c** **d**

5

6 [Back](#)

MASTER CONTRACT WORK ORDER
BETWEEN THE WISCONSIN DEPARTMENT OF TRANSPORTATION (DEPARTMENT)
AND [REDACTED] INC (CONSULTANT) FOR
MASTER CONTRACT TYPE: LOCAL PROGRAM MANAGEMENT
MASTER CONTRACT PROJECT ID 0695 - 93 - 12
WORK ORDER NUMBER 202
Project ID 9006-03-00
Oconto Sidewalk and Crossing Improvements
City of Oconto
Oconto County
DOT FOS OBJECT CODE 5500

C.O. FILES

This WORK ORDER made and entered into by and between the DEPARTMENT and the CONSULTANT



View Invoice Documents in CARS

Use this process to view an invoice in CARS to approve it in PeopleSoft. When the invoice is paid in PeopleSoft, the interface triggers updates the CARS record and the associated paid invoice PDF. In addition, CARS sends an email to consultants informing them that the invoice is paid. Access the *Dashboard* page by clicking **Home** on the main menu.

1. Expand the **Invoices** section on your dashboard. CARS lists all invoices that are approved for payment on dashboards for Expenditure Accountants. You will also see invoices that you have checked out for payment.
2. Locate the invoice to pay.
 - a. If needed, sort the invoices to help to find the one you need. Click the blue link in the column heading to sort A to Z, and click it again to sort Z to A. When you sort by **Status** (A-Z), the approved invoices are listed first.
 - b. Use the page selection tools to see more invoices in the list.
3. Click the invoice link in the **Project Id/Master/WO#** column for the appropriate invoice. CARS opens the invoice.

PATWANE Project, Contract or Master Contract:

▶ Evaluations

1 ▶ Invoices b

38 items found, displaying 31 to 38. a [First/Prev] 1, 2, 3, 4 [Next/Last]

Project Id/Master /WO #	Type	Prime Vendor	Contact Name	Project Manager	Status	Consultant Invoice#	Created Date	Invoice Period
0687-11-10		BC Environmental, LLC	Annette Mueller	Sharon Bremser	Approved	73 MTC 5-14	08/05/2014	05/01/2014 to 05/31/2014
0687-11-20		BC Paving	Mary Greuel	Sharon Bremser	Checked Out for Payment	20140570	08/05/2014	06/01/2014 to 07/31/2014
1330-24-00		DAAR Engineering, Inc.	Dan Shulman	Doug Cain	Approved	54	08/03/2014	07/01/2014 to 07/23/2014
0687-11-24		Nowata	Connie Stuart		Approved	241 MTC 2 7-14	08/07/2014	07/01/2014 to 07/31/2014

38 items found, displaying 34 to 38. b [First/Prev] 1, 2, 3, 4 [Next/Last]

▶ Favorite Contracts

▶ User Notes

Note: If you have checked out an invoice for payment, only you can pay this invoice. Other users can view the invoice, but cannot pay it or send it back to the approver. If you need access to a checked out invoice, contact the CARS Administrator.



View Invoice Documents in CARS - continued

4. Scroll down to the **Upload Documents** section.
5. Click the *Submitted Partial Invoice* link to view the PDF for this invoice.

Contract Paid Summary

Total DBE Cost :	\$0.00
Total Non-DBE Cost :	\$102,325.00
Prime Contract Maximum :	\$78,000.00
Sub Contract Maximum :	\$16,000.00
Amendment Contract Maximum :	\$8,325.00
Total Contract Maximum :	\$102,325.00
Previously Paid on Contract :	\$5,000.00
Remaining Agreement Balance :	\$97,325.00

Upload Documents

One item found. 1

Document Description	Created Date
5 Submitted Partial Invoice	June 21, 2016 14:21:05

One item found. 1

Consultant Certification

I certify that to the best of my knowledge the work as listed has been completed, represents no duplication of payments, and that all costs are in compliance with the contract terms.

Submitted By: Sara Reed **Submitted Date:** 21-Jun-2016 02:21:04 PM



APPENDIX 12 Determine Contract Status

WisDOT users can determine the approval status of contracts either by searching for *Recommendation to Governor for Contract Approval* (form DT25) document information or by opening the contract page to check approval and other dates. DT25 documents are required for contracts over \$3000 and some amendments.



WisDOT: Determine Status from DT25

Use this process to

1. Open the *Search DT25* page.
 - Path: **DT25**→**Search DT25**
2. Enter search criteria in the fields to limit the search results.
3. Click **Search**. CARS lists DT25 documents that meet the criteria. If only one DT25 is found, CARS opens the appropriate *View CARS DT25* page directly.

Note: Entering no search criteria will cause CARS to list all DT25 records.

4. If there is more than one search result, click the link to the *View CARS DT25* page in the **Master/Project Id** column. CARS opens the appropriate *View CARS DT25* page.

RAYFOX Project, Contract or Master Contract:

Search DT25

DT25 Information

All Non-Canceled Canceled

Project, Contract or Master Contract:

Vendor

Region

Contract Function

Month Of LET

Beginning (Date Received)

LET Year

Ending (Date Received)

LET Number

3

RAYFOX Project, Contract or Master Contract:

[Back To DT25 Search](#)

DT25 Search Results
2 items found, displaying all items. 1

Master/Project Id	Contract Function Type	Amt#	Vendor	Date To Sec.	Date To Gov.	Date To Orig.	Cancel Date.	Contract Amount
1000-00-00	Design Services		Dane County	05/22/2013	05/31/2013	06/06/2013		\$1,398,858.60
1000-00-00	Design Engineering		City of Milwaukee	11/16/2011	11/18/2011	11/29/2011		\$1,625,697.93

2 items found, displaying all items. 1

[Back To View Contract](#)



WisDOT: Determine Status from DT25 - continued

- Review the dates in the **Approvals** section to determine the status of the contract.

JCW11 Project, Contract or Master Contract:

View CARS DT25

▼ Details

Contract Number 1400000000	Date Received 11/21/2011
Amendment Number	Contract Function Type: Traffic Engineering Services
Master Contract ID: M30423042	Cancel Date:
Priority	

5 ▼ Approvals

Date To Secretary 11/21/2011	Date From Secretary 11/22/2011	
Date To Governor 11/22/2011	Date From Governor 12/04/2011	
Date To Originator 02/10/2013	DT25 Needed Yes	Comments
Approved Date 02/07/2013	Authorized Date 02/07/2013	



WisDOT: Determine Authorized Date from Contract

DOT users who have authorization to view contracts can verify approval and authorization dates.

1. Search for and open the appropriate contract. Use the **Search** menu (see page 21) or the search field (see page 25) or a Favorites link on your dashboard (see page 48) to open the *View Contract* page.
2. Review the approval and authorization dates in the **Contract Details** section to determine the status of the contract.

RAYFOX Project, Contract or Master Contract:

View Contract

[Contract Reports](#)

Contract Information

Project ID: 1000-00-66 Contract Number: 417110067
Contract Type: Regular Purchase Order Number: 3484229

Phase: [Phase](#) Contract Function: [Contract Function](#)

Associated Projects
Nothing found to display.

[Cost Benefit Analysis\(CBA\)](#)

Contract Details

Phase: 0	Cost Per Hour: \$64.03
Labor Hours: 2280.0	Calculated Fixed Fee Percentage: 0.00
Direct Labor Cost: \$145,778.34	2 Date Submitted: 08/24/2011
Overhead Cost: \$0.00	Date Approved: 09/14/2011
Fixed Fee: \$0.00	Date Authorized: 09/14/2011
Direct Expenses: \$215.34	Original Completion Date: 02/28/2013
Additional Costs: \$0.00	Current Completion Date: 04/30/2014
Orig. Prime Vendor Cost: \$145,993.68	Consultant Contact: Smith Adam
Orig. Subcontract Cost: \$0.00	Consultant Phone: (555) 555-5555
Orig. Contract Cost: \$145,993.68	Project Manager: Lane JC
Total Amendment Cost: \$0.00	
Current Total Cost: \$145,993.68	
If Authorized Cost: \$0.00	
If Not Authorized Cost: \$0.00	



APPENDIX 13 Import XML Invoice

Consultants: Import an Invoice

CARS allows you to import invoice information using an Extensible Markup Language (XML) document. XML invoice imports replicate the process of entering invoices manually, but data entry is automated. Complete XML documents used to import data into CARS may be generated, for example, from your firm's financial software using a custom routine. You can also export invoice data to Microsoft Excel® or Access®, adjust the data as needed, and then generate the XML invoice using Visual Basic for Applications (VBA) or another programming language to generate a complete CARS XML invoice. Partial invoice data can be generated automatically and then blocks of elements can be copied and pasted into an existing XML document. See [Appendix 14](#) on page 273 for detailed guidance on generating XML blocks from Excel; see *Consultants: Import Actual Cost or Specific Rate Invoice with Empty Cost Blocks* on page 266 for details about how to structure an invoice when there are no costs of a particular type on the invoice.

The XML document creation process will vary for every consultant. Currently, the invoice data must be imported for each contract separately; there is no batch process. XML invoices may be uploaded for both prime consultants and subcontractors.

Note: XML imports may currently be used for DT1510 Consultant Contract Invoices only. Do not use for DT1511 Journal Vouchers.

Many resources for XML information are available on the [CARS page](http://www.dot.wisconsin.gov/business/engrserv/cars.htm) (<http://www.dot.wisconsin.gov/business/engrserv/cars.htm>).

XML Invoice Structure

XML documents must strictly adhere to the requirements as defined in a **schema**. The CARS schema specifies the content, structure, and some format requirements for XML documents used to import invoices, which ensures that the data is imported correctly into CARS. A graphic representation of the CARS schema is shown in Figure 3 on page 254. The schema itself is available on the [CARS page](http://www.dot.wisconsin.gov/business/engrserv/cars.htm) (<http://www.dot.wisconsin.gov/business/engrserv/cars.htm>).

Documents meeting the CARS schema requirements are **valid**. If an XML invoice document is not valid, CARS will either import only part of the invoice data or fail to create the invoice. Invoices that partially or fully fail to import generate error messages. The CARS schema allows elements only; comments cannot be included in the invoice.

Line spaces (returns) are not considered in XML document processing. However, they are useful to organize code blocks and improve readability.

The XML document consists of the XML declaration in the first line of code and the content **elements**. As for most markup languages, each element is delimited by start and end **tags** that identify it as a specific entry. Some elements contain other elements. Elements that contain other elements are **parent elements**, and the elements they contain are **child elements**. Tags where data is not provided and not required must be present in the document, but they can contain no data; these are called **empty elements**. The table beginning on page 255 lists the CARS schema elements and some basic details about each element.



Consultants: Import an Invoice - continued

CARS XML invoices always consist of a header block, an invoice information block, and the invoice details. Each invoice contains one header block, one information block, and one invoice details block. The header and information blocks contain the same types of elements for each invoice, but the invoice details vary because this block contains the cost line items. The cost line items in an invoice are determined by the cost basis in the contract terms. XML invoices often have only one cost line item block, but it is possible to have more than one. Cost line item blocks can be as simple as a lump sum block, which has seven elements in a single block, or as complex as an actual cost block, which has 39 lines in four blocks with sub-blocks that can repeat. For line items that have sub-blocks, the invoice must contain each sub-block in order to be valid. Figure 4 on page 264 describes the code blocks in an XML invoice.

A sample valid XML lump sum invoice based on the CARS schema and showing examples of the elements is shown in Figure 5 on page 265.

Four-Part Line Item Keys

Four critical values for each cost line item in the XML invoice must exactly match values in the contract, including capitalization and spaces. (Exception: DBEKey elements are flags, and flags are not case sensitive.) These values are found in the **Cost Information** section of each contract and comprise the four-part key combination used to identify the line item uniquely. The four values and the corresponding XML tags are shown in the image below.

▼ **Cost Information**

One item found. 1

[Add Cost Information](#)

DBE	Function	Overhead Rate Type	Basis of Payment	Overhead Cost	Direct Expense	Fixed Fee	Additional Cost	Hours	Direct Labor Cost		
Yes	Traffic Analysis Services	Home Office	Lump Sum	\$0.00	\$0.00	\$0.00	\$0.00	0.0	\$0.00		



Special Characters in XML

Some characters that are used in XML code require special notation if you need to use them in your data. If you must use special characters such as ampersands (&), the less-than sign (<) or the greater-than sign (>), use numeric character references or one of the predefined entities.

Note: An apostrophe (') and quotation marks may be used in most fields without special notation in CARS XML files.

<u>Character</u>	<u>XML Predefined Entity</u> (the semicolon is required)	<u>Unicode Numeric Reference</u>	<u>Unicode Decimal Reference</u>
ampersand (&)	&	\u0026	&
less-than sign (<)	<	\u003C	<
greater-than sign (>)	>	\u003E	>
apostrophe (')	'	\u0027	'
quotation marks (" ")	"	\u0022	"

Note: Text data exported from financial systems into CDATA sections do not require special notation as long as the CDATA remains intact in the XML.

Partial Invoice Imported as XML

It is possible to import part of an invoice as XML. You can use an “empty” invoice as a basis, copy in details from an XML or Excel export, import the invoice, and manually complete it in CARS. See *Consultants: Import Incomplete Invoice* on page 266 for more information, and see Appendix 14: *Using Spreadsheet Data to Create CARS XML Invoices* on page 273 for details.

Note: Code samples shown in this appendix are displayed in *Notepad++*, a free XML editor available from <http://notepad-plus-plus.org/>



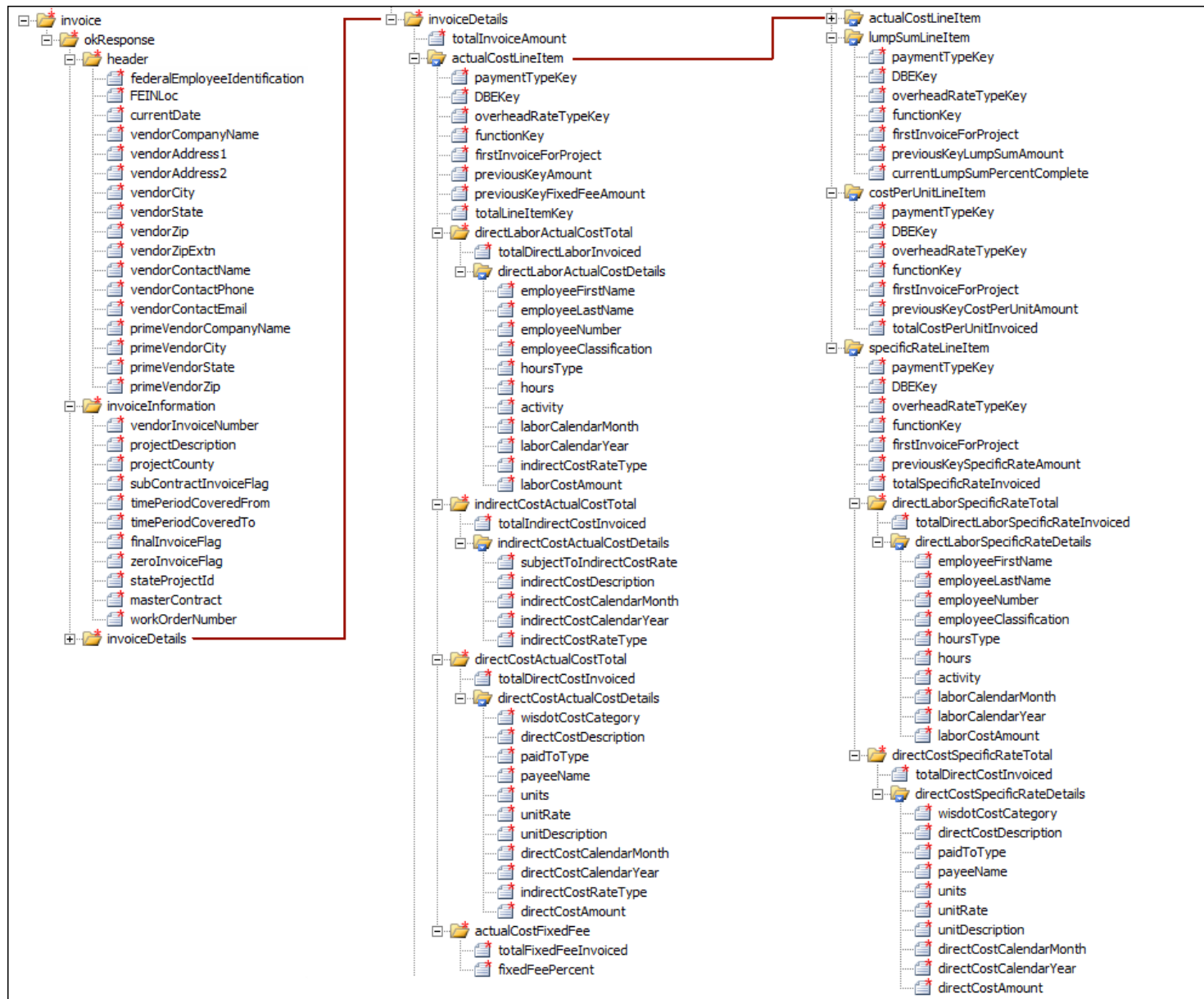


Figure 3 - Graphic Representation of the CARS Schema



CARS XML Element Descriptions

<u>XML Element Name</u>	<u>Required</u>	<u>Format Requirements</u>	<u>Notes</u>
header			Header block is required for all XML invoices
federalEmployeeIdentification	Yes, always	9 digits	Firm's FEIN (Federal Employer ID Number) Critical for matching consultant to project
FEINLoc	Yes, always	1 digit, usually 0	Location code; used when a consultant has more than one location.
currentDate	Yes, always	YYYYMMDD	
vendorCompanyName		50 character limit	
vendorAddress1			Information only: for consultant records
vendorAddress2			Information only: for consultant records
vendorCity			Information only: for consultant records
vendorState			Information only: for consultant records
vendorZip			Information only: for consultant records
vendorZipExtn			Information only: for consultant records
vendorContactName	Yes, always	60 character limit	
vendorContactPhone	Yes, always	999-999-9999	
vendorContactEmail	Yes, always	100 character limit	
primeVendorCompanyName			Information only: for consultant records
primeVendorCity			Information only: for consultant records
primeVendorState			Information only: for consultant records
primeVendorZip			Information only: for consultant records
End header			
invoiceInformation			Invoice Information block is required for all XML invoices
vendorInvoiceNumber	Yes, always	20 character limit	
projectDescription			Information only: for consultant records
projectCounty			Information only: for consultant records
subContractInvoiceFlag		1 character	Must be "Y" for subcontract invoices. May be "N" or empty for primes. Not case sensitive.
timePeriodCoveredFrom	Yes, always	YYYYMMDD	
timePeriodCoveredTo	Yes, always	YYYYMMDD	



<u>XML Element Name</u>	<u>Required</u>	<u>Format Requirements</u>	<u>Notes</u>
finalInvoiceFlag	Yes, always	Y/N	Not case sensitive.
zeroInvoiceFlag	Yes, always	Y/N	Not case sensitive.
stateProjectID	Yes, always	9999-99-99	hyphens are required
masterContract	Only for work orders	M99999999	"M" is required, and use no hyphens Required for work order invoices Must be empty for regular contracts
workOrderNumber	Only for work orders		Required for work order invoices Must be empty for regular contracts
END invoiceInformation			
invoiceDetails			Contains the totalInvoiceAmount element plus one or more line item blocks. Invoice Details block is required for all XML invoices
totalInvoiceAmount			
actualCostLineItem			Actual Cost line item block (includes all aqua-shaded items)
paymentTypeKey	Yes, for actual cost invoice	"Actual Cost"	Component of 4-part key
DBEKey	Yes, for actual cost invoice	Y/N	Component of 4-part key, must exactly match contract cost information. Not case sensitive.
overheadRateTypeKey	Yes, for actual cost invoice		Component of 4-part key, must exactly match contract cost information. Case-sensitive.
functionKey	Yes, for actual cost invoice		Component of 4-part key, must exactly match contract cost information. Case-sensitive.
firstInvoiceForProject	Yes, for actual cost invoice	Y/N	"Y" when the invoice is the first one for the project in CARS; if not, use "N". Not case sensitive.
previousKeyAmount		up to 2 decimal places only	Use only for the first invoice entered in CARS and only when invoices have been paid outside CARS (on paper).
previousKeyFixedFeeAmount		up to 2 decimal places only	Use only for the first invoice entered in CARS and only when invoices have been paid outside CARS (on paper).



<u>XML Element Name</u>	<u>Required</u>	<u>Format Requirements</u>	<u>Notes</u>
totalLineItemKey		up to 2 decimal places only	Information only. Total for actual cost items on this invoice. CARS calculates this total using all actual cost amounts.
directLaborActualCostTotal			
totalDirectLaborInvoiced		up to 2 decimal places only	Information only. CARS calculates this total using actual cost direct labor amounts.
directLaborActualCostDetails			
employeeFirstName	Yes, for actual cost invoice		Minimum of one character
employeeLastName	Yes, for actual cost invoice		Minimum of one character
employeeNumber			
employeeClassification	Yes, for actual cost invoice		
hoursType	Yes, for actual cost invoice		Typically “Hours Worked” The option “Premium Pay” is permitted on a contract-by-contract basis, and only rarely. Not case-sensitive.
hours	Yes, for actual cost invoice	up to 2 decimal places only	
activity	Yes, for actual cost invoice		1 to 4 digit activity code as defined in CARS and FDM 8-10 attachment 1.3 . See the CARS page for complete Code and type lists.
laborCalendarMonth	Yes, for actual cost invoice	MM	Combined with year and indirectCostRateType, this value determines the overhead rate applied to the laborCostAmount value.
laborCalendarYear	Yes, for actual cost invoice	YYYY	Combined with month and indirectCostRateType, this value determines the overhead rate applied to the laborCostAmount value.
indirectCostRateType	Yes, for actual cost invoice		Combined with month and year, this value determines the overhead rate applied to the laborCostAmount value. See the CARS page for complete Code and type lists. Not case-sensitive.



<u>XML Element Name</u>	<u>Required</u>	<u>Format Requirements</u>	<u>Notes</u>
laborCostAmount	Yes, for actual cost invoice	up to 2 decimal places only	
END laborCostDetails			
END directLaborActualCostTotal			
indirectCostActualCostTotal			Use this block only when your firm is allowed to apply overhead to actual costs. This situation is rare.
totalIndirectCostInvoiced		up to 2 decimal places only	Information only. CARS calculates this total using actual cost indirect cost amounts.
indirectCostActualCostDetails			
subjectToIndirectCostsRate	Yes, for actual cost invoice	up to 2 decimal places only	
indirectCostDescription	Yes, for actual cost invoice		
indirectCostCalendarMonth	Yes, for actual cost invoice	MM	Combined with year and indirectCostRateType, this value determines the overhead rate applied to the subjectToIndirectCostsRate value.
indirectCostCalendarYear	Yes, for actual cost invoice	YYYY	Combined with month and indirectCostRateType, this value determines the overhead rate applied to the subjectToIndirectCostsRate value.
indirectCostRateType	Yes, for actual cost invoice		Combined with month and year, this value determines the overhead rate applied to the subjectToIndirectCostsRate value. See the CARS page for complete Code and type lists. Not case-sensitive.
END indirectCostDetails			
END indirectCostTotal			
directCostActualCostTotal			
totalDirectCostInvoiced		up to 2 decimal places only	Information only. CARS calculates this total using actual cost direct cost amounts.
directCostActualCostDetails			



<u>XML Element Name</u>	<u>Required</u>	<u>Format Requirements</u>	<u>Notes</u>
wisdotCostCategory	Yes, for actual cost invoice		Cost category as defined in CARS. See the CARS page for complete Code and type lists. Not case-sensitive.
directCostDescription	Yes, for actual cost invoice		
paidToType	Yes, for actual cost invoice	“Internal Allocation” or “Payment”	Not case-sensitive.
payeeName	Yes, for actual cost invoice		
units	Yes, for actual cost invoice		
unitRate		up to 4 decimal places only	required when <i>units</i> is not empty
unitDescription		20 character limit	required when <i>units</i> is not empty
directCostCalendarMonth	Yes, for actual cost invoice	MM	Combined with year and indirectCostRateType, this value determines the overhead rate applied to the directCostAmount value. See the CARS page for complete Code and type lists.
directCostCalendarYear	Yes, for actual cost invoice	YYYY	Combined with month and indirectCostRateType, this value determines the overhead rate applied to the directCostAmount value. See the CARS page for complete Code and type lists.
indirectCostRateType			Enter an indirect rate type only when your firm is allowed to apply overhead to direct costs. This situation is rare. Combined with month and year, this value determines the overhead rate applied to the directCostAmount. See the CARS page for complete Code and type lists. Not case-sensitive.
directCostAmount	Yes, for actual cost invoice	up to 2 decimal places only	
END directCostActualCostDetails			
END directCostActualCostTotal			



<u>XML Element Name</u>	<u>Required</u>	<u>Format Requirements</u>	<u>Notes</u>
actualCostFixedFee			
totalFixedFeeInvoiced		2 decimal places only	Information only. CARS calculates this total using the fixed fee percent.
fixedFeePercent	Yes, for actual cost invoice	up to 4 decimal places	
END actualCostFixed Fee			
END actualCostLineItem			
costPerUnitLineItem			Cost Per Unit line item block (includes all yellow-shaded items)
paymentTypeKey	Yes, for cost per unit invoice	"Cost Per Unit"	Component of 4-part key
DBEKey	Yes, for cost per unit invoice		Component of 4-part key, must exactly match contract cost information
overheadRateTypeKey	Yes, for cost per unit invoice		Component of 4-part key, must exactly match contract cost information
functionKey	Yes, for cost per unit invoice		Component of 4-part key, must exactly match contract cost information
firstInvoiceForProject	Yes, for cost per unit invoice	Y/N	"Y" when the invoice is the first one for the project in CARS; if not, use "N". Not case sensitive.
previousKeyCostPerUnitAmount		2 decimal places only	Use only for the first invoice entered in CARS and only when invoices have been paid outside CARS.
totalCostPerUnitInvoiced	Yes, for cost per unit invoice	2 decimal places only	
END costPerUnitLineItem			
lumpSumLineItem			Lump Sum line item block (includes all blue-shaded items)
paymentTypeKey	Yes, for lump sum invoice	"Lump Sum"	Component of 4-part key
DBEKey	Yes, for lump sum invoice		Component of 4-part key, must exactly match contract cost information



<u>XML Element Name</u>	<u>Required</u>	<u>Format Requirements</u>	<u>Notes</u>
overheadRateTypeKey	Yes, for lump sum invoice		Component of 4-part key, must exactly match contract cost information
functionKey	Yes, for lump sum invoice		Component of 4-part key, must exactly match contract cost information
firstInvoiceForProject	Yes, for lump sum invoice	Y/N	"Y" when the invoice is the first one for the project in CARS; if not, use "N". Not case sensitive.
previousKeyLumpSumAmount		2 decimal places only	Use only for the first invoice entered in CARS and only when invoices have been paid outside CARS.
currentLumpSumPercentComplete	Yes, for lump sum invoice	up to 6 decimal places only	Cumulative percent complete of the contract work. See pages 84 and 236 for more information about fixed fees.
END lumpSumLineItem			
specificRateLineItem			Specific Rate line item block (includes all green-shaded items)
paymentTypeKey	Yes, for specific rate invoice	"Specific Rate"	Component of 4-part key
DBEKey	Yes, for specific rate invoice		Component of 4-part key, must exactly match contract cost information
overheadRateTypeKey	Yes, for specific rate invoice		Component of 4-part key, must exactly match contract cost information
functionKey	Yes, for specific rate invoice		Component of 4-part key, must exactly match contract cost information
firstInvoiceForProject	Yes, for specific rate invoice	Y/N	"Y" when the invoice is the first one for the project in CARS; if not, use "N". Not case sensitive.
previousKeySpecificRateAmount		up to 2 decimal places only	Use only for the first invoice entered in CARS and only when invoices have been paid outside CARS.
totalSpecificRateInvoiced			
directLaborSpecificRateTotal			



<u>XML Element Name</u>	<u>Required</u>	<u>Format Requirements</u>	<u>Notes</u>
totalDirectLaborSpecialRateInvoiced			Information only. CARS calculates this total using specific rate direct labor amounts.
directLaborSpecificRateDetails			
employeeFirstName	Yes, for specific rate invoice		Minimum of one character
employeeLastName	Yes, for specific rate invoice		Minimum of one character
employeeNumber			
employeeClassification	Yes, for specific rate invoice		
hoursType	Yes, for specific rate invoice		Typically "Hours Worked" The option "Premium Pay" is permitted on a contract-by-contract basis, and only rarely. Not case-sensitive.
hours	Yes, for specific rate invoice		
activity	Yes, for specific rate invoice		1 to 4 digit activity code as defined in CARS and FDM 8-10 attachment 1.3 . See the CARS page for complete Code and type lists.
laborCalendarMonth	Yes, for specific rate invoice	MM	
laborCalendarYear	Yes, for specific rate invoice	YYYY	
laborCostAmount	Yes, for specific rate invoice	up to 2 decimal places only	
END directLaborSpecificRateDetails			
END directLaborSpecificRateTotal			
directCostSpecificRateTotal			
totalDirectCostInvoiced		up to 2 decimal places only	Information only. CARS calculates this total using specific rate direct cost amounts.
directCostSpecificRateDetails			



<u>XML Element Name</u>	<u>Required</u>	<u>Format Requirements</u>	<u>Notes</u>
wisdotCostCategory	Yes, for specific rate invoice		Cost category as defined in CARS. See the CARS page for complete Code and type lists. Not case-sensitive.
directCostDescription	Yes, for specific rate invoice		
paidToType	Yes, for specific rate invoice	“Internal Allocation” or “Payment”	Not case-sensitive.
payeeName	Yes, for specific rate invoice		
units	Yes, for specific rate invoice		
unitRate		up to 2 decimal places only	required when <i>units</i> is not empty
unitDescription		20 character limit	required when <i>units</i> is not empty
directCostCalendarMonth	Yes, for specific rate invoice	MM	
directCostCalendarYear	Yes, for specific rate invoice	YYYY	
directCostAmount	Yes, for specific rate invoice	up to 2 decimal places only	
END directCostSpecificRateDetails			
END directCostSpecificRateTotal			
END specificRateLineItem			
END invoiceDetails			



CARS XML Invoice Code Blocks

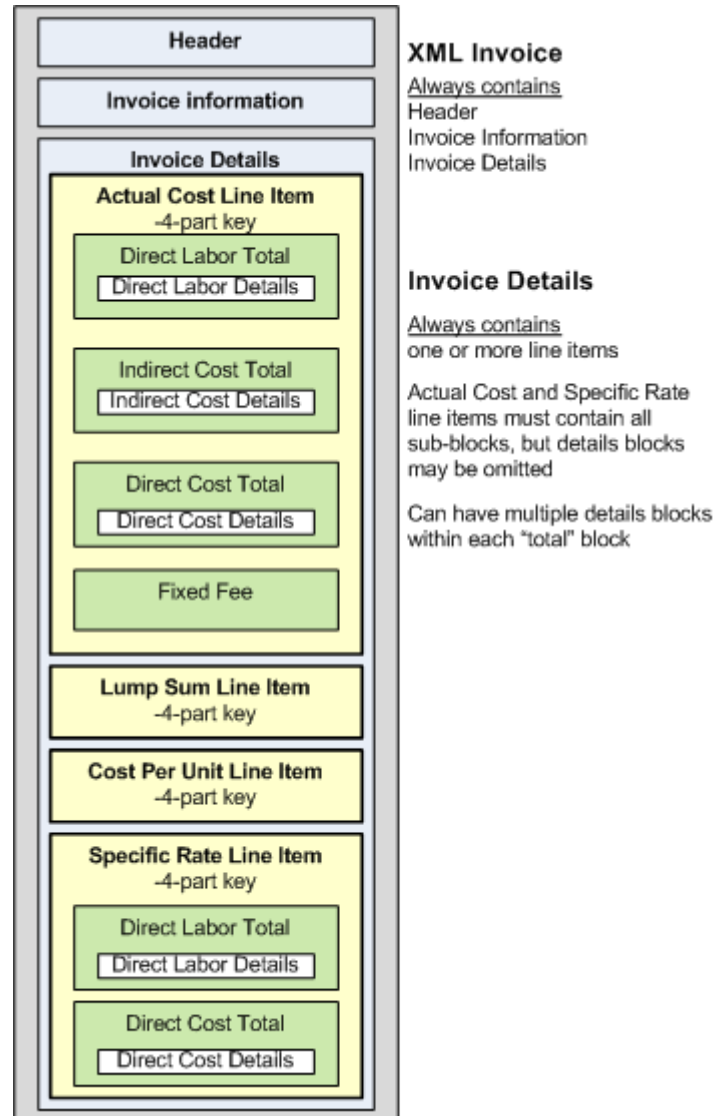


Figure 4 - Code Blocks in XML Invoices



Sample Valid XML Invoice

```

1 <?xml version="1.0" encoding="UTF-8"?>
2 <invoice xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" >
3 <okResponse>
4 <header>
5 <federalEmployeeIdentification>99999999</federalEmployeeIdentification>
6 <FEINLoc>0</FEINLoc>
7 <currentDate>20150421</currentDate>
8 <vendorCompanyName>Osage &amp; Co.</vendorCompanyName>
9 <vendorAddress1/>
10 <vendorAddress2/>
11 <vendorCity/>
12 <vendorState/>
13 <vendorZip></vendorZip>
14 <vendorZipExtn></vendorZipExtn>
15 <vendorContactName>Max Brewer</vendorContactName>
16 <vendorContactPhone>444-444-4444</vendorContactPhone>
17 <vendorContactEmail>max@osage.ccm</vendorContactEmail>
18 </header>
19 <primeVendorCompanyName></primeVendorCompanyName>
20 <primeVendorCity></primeVendorCity>
21 <primeVendorState></primeVendorState>
22 <primeVendorZip></primeVendorZip>
23 </header>
24
25 <invoiceInformation>
26 <vendorInvoiceNumber>00981001 04-15</vendorInvoiceNumber>
27 <projectDescription></projectDescription>
28 <projectCounty>Various</projectCounty>
29 <subContractInvoiceFlag></subContractInvoiceFlag>
30 <timePeriodCoveredFrom>20150301</timePeriodCoveredFrom>
31 <timePeriodCoveredTo>20150331</timePeriodCoveredTo>
32 <finalInvoiceFlag>Y</finalInvoiceFlag>
33 <zeroInvoiceFlag>N</zeroInvoiceFlag>
34 <stateProjectId>0098-10-04</stateProjectId>
35 <masterContract></masterContract>
36 <workOrderNumber></workOrderNumber>
37 </invoiceInformation>
38

```

Annotations in the image:

- Line 1: XML Declaration
- Line 2: Start Tag for Invoice
- Line 3: Start Tag of Parent Element
- Line 4: XML Predefined Code for ampersand (&) character
- Line 13: Empty Elements
- Line 18: Start Tag
- Line 19: Data
- Line 23: End Tag
- Line 24: Empty lines and spacing outside elements are ignored during translation, but are useful for readability
- Line 25: End Tag of Parent Element

Figure 5 - Sample Valid XML Document



Consultants: Import Actual Cost or Specific Rate Invoice with Empty Cost Blocks

There will be times when you won't have costs of a given type to report for a time period or for a contract. For example, not all actual cost or specific rate contracts have direct costs every month. The XML invoice still must contain each major cost type element and any top-level elements. The details blocks may be omitted as shown below.

Note: Using empty blocks does not apply to lump sum and cost per unit invoices because these invoice types do not contain details blocks.

<u>Actual Cost Direct Labor</u>
<pre><directLaborActualCostTotal> <totalDirectLaborInvoiced></totalDirectLaborInvoiced> </directLaborActualCostTotal></pre>
<u>Actual Cost Indirect Cost</u>
<pre><indirectCostActualCostTotal> <totalIndirectCostInvoiced></totalIndirectCostInvoiced> </indirectCostActualCostTotal></pre>
<u>Actual Cost Direct Costs</u>
<pre><directCostActualCostTotal> <totalDirectCostInvoiced></totalDirectCostInvoiced> </directCostActualCostTotal></pre>
<u>Specific Rate Direct Labor</u>
<pre><directLaborSpecificRateTotal> <totalDirectLaborSpecificRateInvoiced></totalDirectLaborSpecificRateInvoiced> </directLaborSpecificRateTotal></pre>
<u>Specific Rate Direct Cost</u>
<pre><directCostSpecificRateTotal> <totalDirectCostInvoiced></totalDirectCostInvoiced> </directCostSpecificRateTotal></pre>



Consultants: Common Invoice Import Errors

See *Search for Invoices* on page 38 and *Delete Invoices* on page 96 for instructions for these processes.

When there is an error in a cost block, CARS still imports the errors that do not contain errors.

Draft status already exists

1. A draft status invoice already exists. Search for the invoice and either delete it or edit it manually. Only one invoice in draft status is allowed per contract. Alternatively, you may simply need to submit the existing invoice.

Not found a record with 4 part key

2. No match for the four-part key line item. Click **Show Invoice** to open the invoice and manually edit it to match all four key cost field values to match the values in the contract. You can also delete the invoice, edit the XML, and import again. See *Four-Part Line Item Keys* on page 252 for more information.

No Contract exists

3. Project, master contract or work order number mismatch for the vendor FEIN. Verify that the data for the following tags match the contract information:
 - <stateProjectId>
 - <masterContract>
 - <workOrderNumber>

The screenshot shows a web interface titled "View Errors". At the top right, there are two buttons: "Print Page" (with a printer icon) and "Back to View Contract" (with a left-pointing arrow). Below the title, there is a dropdown menu labeled "Upload Error List". Underneath the dropdown, the error message reads: "--- Draft status already exists for Consultant Invoice Number 1".

Import Error 1

The screenshot shows a web interface titled "View Errors". At the top right, there are two buttons: "Print Page" (with a printer icon) and "Back to View Contract" (with a left-pointing arrow). Below the title, there is a dropdown menu labeled "Upload Error List". Underneath the dropdown, the text "Consultant Invoice Number : 1" is displayed next to a "Show Invoice" button. Below this, the error message reads: "--- Not found a record with 4 part key combination in the ContractCost table for LumpSum Line Items."

Import Error 2

The screenshot shows a web interface titled "View Errors". At the top right, there are two buttons: "Print Page" (with a printer icon) and "Back to View Contract" (with a left-pointing arrow). Below the title, there is a dropdown menu labeled "Upload Error List". Underneath the dropdown, the error message reads: "--- No Contract exists for Vendor 5781".

Import Error 3



Consultants: Common Invoice Import Errors - continued

Indirect Cost Rate Type not found

4. The indirect cost rate type may be:
 - Not entered correctly in the XML code. Check the code and correct
 - Not valid for this contract. Check the cost rate types that are valid for this contract. Contact the [CARS Administrator](#) if the rate type is needed.
 - Expired. Contact the [CARS Administrator](#) if the rate type is needed.

Data Needed

5. CARS checks direct labor, indirect cost, and direct cost blocks in actual cost and specific rate XML invoices for completeness. If information is missing for one or more required elements, CARS creates a list of missing data.

View Errors [Print Page](#) [Back to View Workorder](#)

▼ [Upload Error List](#)

Consultant Invoice Number : 04 [Show Invoice](#)

--- Indirect Cost Rate Type value not found in XML for Indirect Actual Cost.

Import Error 4

▼ [Upload Error List](#)

Consultant Invoice Number :PSpecRate-U1 [Show Invoice](#)

--- WisDOT CostCategory , Cost Description , Paid Type , Month , Year , Direct Cost needed. Please fill the Direct Cost (incomplete block) - Specific Rate Cost Line Item.

▼ [Upload Error List](#)

Consultant Invoice Number :PActCost-U4 [Show Invoice](#)

--- Classification needed. Please fill the Direct Labor (incomplete block) - Actual Cost Line Item.

▼ [Upload Error List](#)

Consultant Invoice Number :-[] [Show Invoice](#)

--- Activity needed. Please fill the Direct Labor (incomplete block) - Actual Cost Line Item.

▼ [Upload Error List](#)

Consultant Invoice Number :-D [Show Invoice](#)

--- Subject InDirect Cost Rate needed. Please fill the InDirect Cost (incomplete block) - Actual Cost Line Item.

▼ [Upload Error List](#)

Consultant Invoice Number :-) [Show Invoice](#)

--- PayeeName needed. Please fill the Direct Cost (incomplete block) - Actual Cost Line Item.

Import Error 5



Consultants: Common Invoice Import Errors - continued

Date Errors

6. CARS checks the month and year values entered in direct labor, indirect cost, and direct cost blocks in actual cost and specific rate XML invoices. If a date is not entered correctly, CARS lists the error.

Rate Type Mismatch Errors

7. CARS checks the indirect cost rate types for cost line details entered in direct labor, indirect cost, and direct cost blocks in actual cost and specific rate XML invoices. If the rate type does not match a valid type in CARS, CARS lists the error. This check validates the rate type name and reports values that are not valid for CARS as a whole.

Rate Type Not Allowed

8. CARS checks the direct and indirect cost rate types for cost line details entered in direct labor, indirect cost, and direct cost blocks in actual cost and specific rate XML invoices. If the rate type is not permitted for the consultant firm, CARS lists the error.

▼ [Upload Error List](#)

Consultant Invoice Number :-/ [Show Invoice](#)

--- Invalid Calendar Month for Direct Labor Actual Cost Line Item , Month as 5

▼ [Upload Error List](#)

Consultant Invoice Number :-) [Show Invoice](#)

--- Invalid Calendar Year for Direct Labor Actual Cost Line Item , Year as 215

Import Error 6

▼ [Upload Error List](#)

Consultant Invoice Number :-{0 [Show Invoice](#)

--- Indirect Cost Rate Type value in XML is not matching in Look up table for Direct Labor Actual Cost for Employee Last Name as User with Indirect Cost Rate Type as Home Ofc

Import Error 7

▼ [Upload Error List](#)

Consultant Invoice Number :661921-2-6 [Show Invoice](#)

--- Indirect Cost Rate Type for Direct Labor Actual Cost is not found in Indirect Cost Rate Type table for Employee Last Name as SANDERS with Indirect Cost Rate Type as Company Wide
--- Indirect Cost Rate Type for Indirect Actual Cost is not found in Indirect Cost Rate Type table, Description as redwith Indirect Cost Rate Type as Company Wide
--- Direct Cost Category Type ID is not found in Direct Cost Type table for Actual Cost, Cost Category as Meals

▼ [Upload Error List](#)

Consultant Invoice Number :PSpecRate-U1 [Show Invoice](#)

--- Direct Cost Rate Type ID is not found in Direct Cost Type table for Specific Rate Cost Line Item , WisDOT Cost Category as Meals

Import Error 8



Consultants: Common Invoice Code Errors

Errors that are due to XML code mistakes specify the location of the error by line number. Some XML editors, including *Notepad++*, show the code with line numbers.

Not facet-valid

1. Date format incorrect or date is invalid. Delete the draft invoice and correct the XML date format so that the pattern is "YYYYMMDD."

Note: In this case, the first error causes the second error because the time period start and end dates are required values.

No child element is expected

2. An end tag is missing for a block. Check the XML code and insert the appropriate tag.

View Errors Print Page Back to View Contract

▼ **Upload Error List**

--- cvc-pattern-valid: Value '20140632' is **not facet-valid** with respect to pattern '((19|20)\d\d)(0[1-9]|1[012])(0[1-9]|1[0-9]|2[0-9]|3[01])' for type 'DateFormatToYYYYmddd': Line Number : 25
 --- cvc-type.3.1.3: The value '20140632' of element 'timePeriodCoveredTo' is not valid.: Line Number : 25

```

20 <invoiceInformation>
21   <vendorInvoiceNumber>blank</vendorInvoiceNumber>
22   <projectDescription>blank</projectDescription>
23   <projectCounty>Dane</projectCounty>
24   <subContractInvoiceFlag>N</subContractInvoiceFlag>
25   <timePeriodCoveredFrom>06012014</timePeriodCoveredFrom>
26   <timePeriodCoveredTo>20140630</timePeriodCoveredTo>
27   <finalInvoiceFlag>N</finalInvoiceFlag>
    
```

XML Code Error 1

▼ **Upload Error List**

--- cvc-complex-type.2.4.d: Invalid content was found starting with element 'invoiceDetails'. **No child element is expected** at this point.: Line Number : 32
 --- unexpected element (uri="", local="invoiceDetails"). Expected elements are <{}workOrderNumber>, <{}subContractInvoiceFlag>, <{}timePeriodCoveredTo>, <{}finalInvoiceFlag>, <{}masterContract>, <{}stateProjectId>, <{}projectCounty>, <{}projectDescription>, <{}vendorInvoiceNumber>, <{}timePeriodCoveredFrom>, <{}zeroInvoiceFlag>: Line Number : 32
 --- The element type "invoiceInformation" must be terminated by the matching end-tag "</invoiceInformation>": Line Number : 44

```

19 <invoiceInformation>
20   <vendorInvoiceNumber>Osage-02</vendorInvoiceNumber>
21   <projectDescription>Design Services</projectDescription>
22   <projectCounty>Marathon</projectCounty>
23   <subContractInvoiceFlag/>
24   <timePeriodCoveredFrom>20140601</timePeriodCoveredFrom>
25   <timePeriodCoveredTo>20140630</timePeriodCoveredTo>
26   <finalInvoiceFlag>N</finalInvoiceFlag>
27   <zeroInvoiceFlag>Y</zeroInvoiceFlag>
28   <stateProjectId>0687-22-55</stateProjectId>
29   <masterContract></masterContract>
30   <workOrderNumber></workOrderNumber>
31   </invoiceInformation> <b style="color: red;">is missing</b>
32 <invoiceDetails>
33   <totalInvoiceAmount>238193.20</totalInvoiceAmount>
34   <lumpSumLineItem>
35     <paymentTypeKey>Lump Sum</paymentTypeKey>
36     <DBEKey>N</DBEKey>
37     <overheadRateTypeKey>Home Office</overheadRateTypeKey>
38     <functionKey>Design Services</functionKey>
39     <firstInvoiceForProject>Y</firstInvoiceForProject>
40     <previousKeyLumpSumAmount>0</previousKeyLumpSumAmount>
41     <currentLumpSumPercentComplete>35</currentLumpSumPercentComplete>
42   </lumpSumLineItem>
43 </invoiceDetails>
    
```

XML Code Error 2



Consultants: Common Invoice Code Errors

Invalid content was found

3. A start tag is missing. Check the XML code and insert the appropriate tag.

View Errors [Print Page](#) [Back to View Contract](#)

▼ **Upload Error List**

--- cvc-complex-type.2.4.a: **Invalid content was found** starting with element totalInvoiceAmount. One of '{invoiceDetails}' is expected.: Line Number : 33
--- unexpected element (uri:"", local:"totalInvoiceAmount"). Expected elements are <{}header>,<{}invoiceDetails>,<{}invoiceInformation>: Line Number : 33
--- unexpected element (uri:"", local:"lumpSumLineItem"). Expected elements are <{}header>,<{}invoiceDetails>,<{}invoiceInformation>: Line Number : 34
--- The element type "okResponse" must be terminated by the matching end-tag "<{}okResponse>":. Line Number : 43

```
19 <invoiceInformation>
20   <vendorInvoiceNumber>Osage-02</vendorInvoiceNumber>
21   <projectDescription>Design Services</projectDescription>
22   <projectCounty>Marathon</projectCounty>
23   <subContractInvoiceFlag/>
24   <timePeriodCoveredFrom>20140601</timePeriodCoveredFrom>
25   <timePeriodCoveredTo>20140630</timePeriodCoveredTo>
26   <finalInvoiceFlag>N</finalInvoiceFlag>
27   <zeroInvoiceFlag>Y</zeroInvoiceFlag>
28   <stateProjectId>0687-22-55</stateProjectId>
29   <masterContract></masterContract>
30   <workOrderNumber></workOrderNumber>
31 </invoiceInformation>
32 <totalInvoiceAmount>238193.20</totalInvoiceAmount>
33 <lumpSumLineItem>
34   <paymentTypeKey>Lump Sum</paymentTypeKey>
35   <DBEKey>N</DBEKey>
36   <overheadRateTypeKey>Home Office</overheadRateTypeKey>
37   <functionKey>Design Services</functionKey>
38   <firstInvoiceForProject>Y</firstInvoiceForProject>
39   <previousKeyLumpSumAmount>0</previousKeyLumpSumAmount>
40   <currentLumpSumPercentComplete>35</currentLumpSumPercentComplete>
41 </lumpSumLineItem>
42 </invoiceDetails>
43
```

XML Code Error 3



Consultants: Non-specific Import Errors

Non-specific error

The “generic” error occurs when CARS cannot match the error to a more specific error code. The generic error occurs when the following conditions were produced in the XML invoice:

- The FEIN does not match the prime consultant
- Comments or other non-element data are in the XML invoice

Error(s):

- An error has occurred and your request cannot be processed.

Please contact the help desk.

XML Import Non-Specific Error



Appendix 14 Save Invoice Supporting Documents as PDF/A

CARS stores uploaded supporting invoice documents only when they are supplied as portable document format (PDF) files. Rarely, a submitted PDF will not save correctly in the CARS system, sometimes because there are problems with the PDF itself. There are many specifications, standards and subsets released since the inception of PDF in 1993. This appendix explains how to save documents using the subset PDF/A, which ensures that the material in the PDF is optimized for archiving. This subset stores all of the document content as embedded content; no links or encryption, layers, executable code, embedded files or transparencies in graphics are included. Embedding all of the content helps to ensure that the file is forward compatible. Instructions are included for *Microsoft® Office®* documents and for converting existing PDF documents to PDF/A (requires *Adobe® Acrobat®*).

Microsoft Office documents are stored as “regular” PDF files by default. To save a document using the PDF/A subset, you must use the *Save As* functionality. Instructions are provided below for two of the later *Office* versions and for Adobe Acrobat XI. The process of saving as a PDF/A file began with *Office* version 15. Using earlier versions of *Office* require that you save as a PDF and then convert the PDF to PDF/A using *Acrobat*.



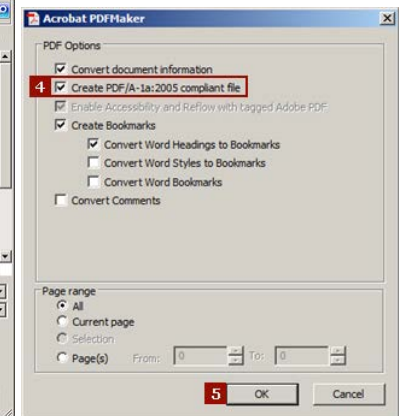
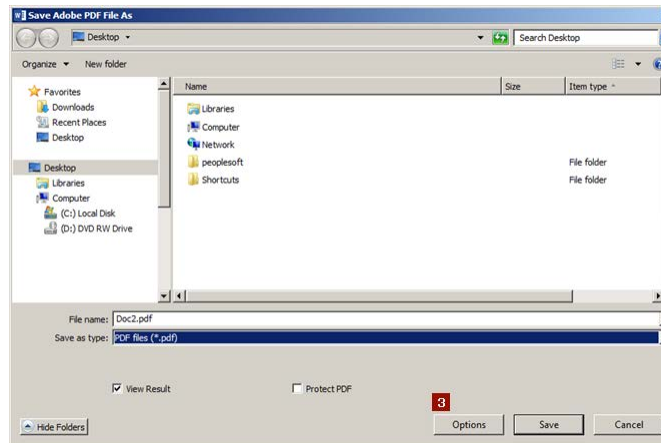
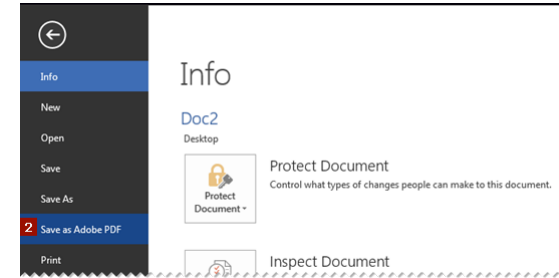
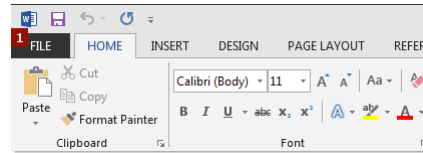
Microsoft Office® 2013, Office 365™ (Office 15)

1. Click **File** on the ribbon.
2. Click **Save as Adobe PDF**.
3. On the *Save Adobe PDF File As* dialog box, click **Options**.
4. Select the **Create PDF/A-1a:2005 compliant file** check box.
5. Click **OK**.
6. Continue saving the file as you normally would.

Note: When you open a PDF/A file in Adobe Acrobat, Acrobat displays the warning shown below. Click **Enable Editing** if you need to modify the file. Then re-save the file as PDF/A as described in [Acrobat XI](#) in this appendix.

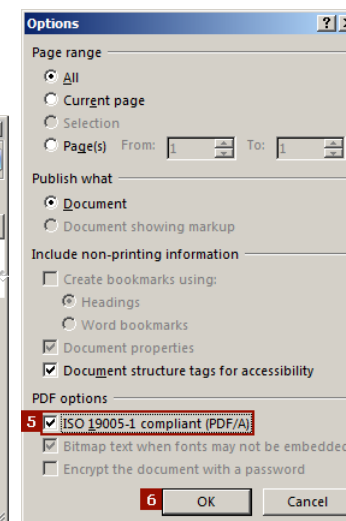
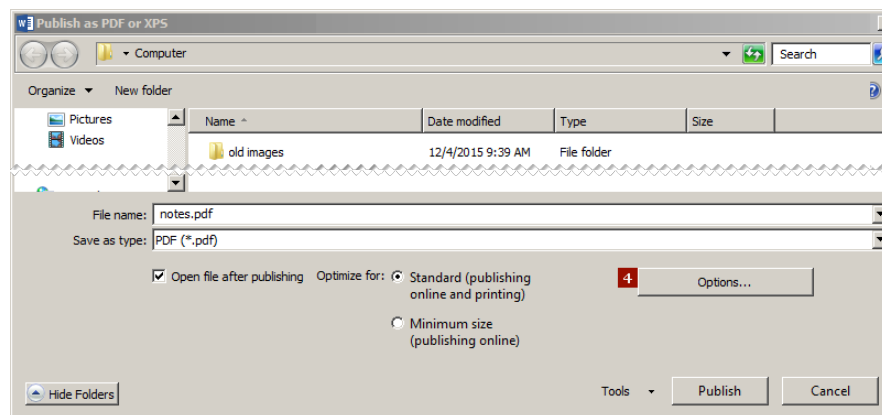
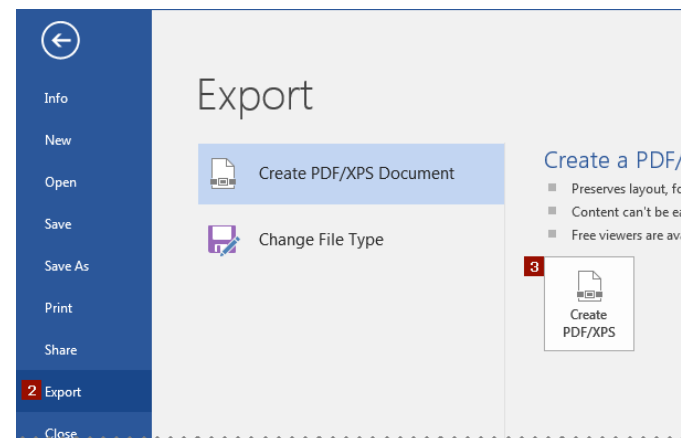
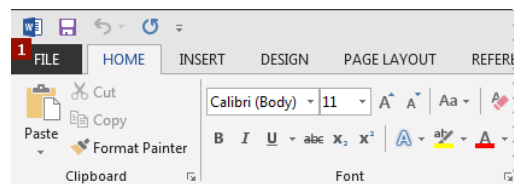
This file claims compliance with the PDF/A standard and has been opened read-only to prevent modification.

Enable Editing



Microsoft Office® 2016 (Office 16)

1. Click **File** on the ribbon.
2. Click **Export**.
3. Click **Create PDF/XPS**. Office opens the **Save As** dialog box.
4. Click **Options**. Office opens the **Options** dialog box.
5. Select the **ISO 19005-1 compliant (PDF/A)** check box.
6. Click **OK**.
7. Continue saving the file as you normally would.



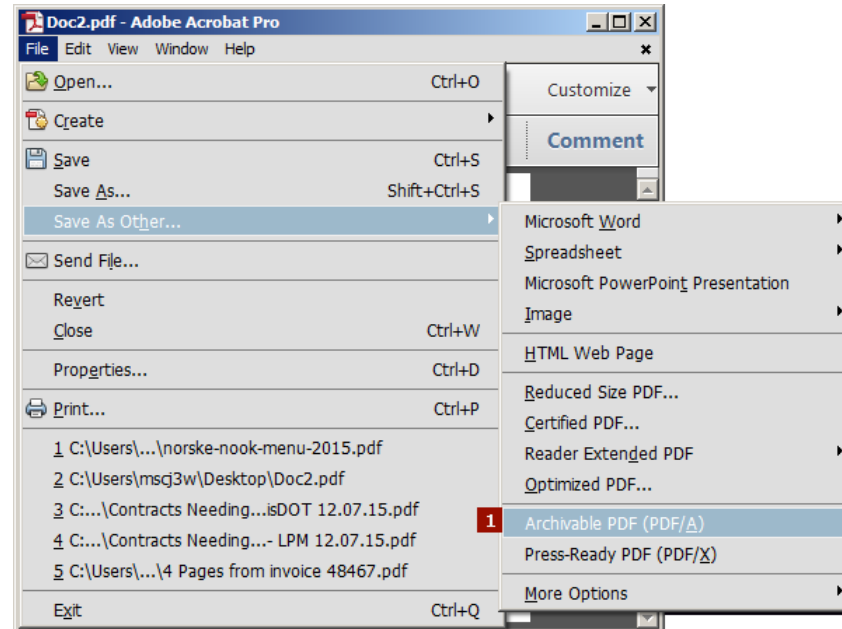
Adobe Acrobat® XI

Option 1: Save As...

You can use either the Save As command or the Save As Other command in Acrobat to convert a “regular” PDF to the PDF/A subset.

1. On the **File** menu, point to **Save As Other...** and then **click Archivable PDF (PDF/A)**. Acrobat opens the Save As dialog box.
2. Continue saving the file as you normally would.

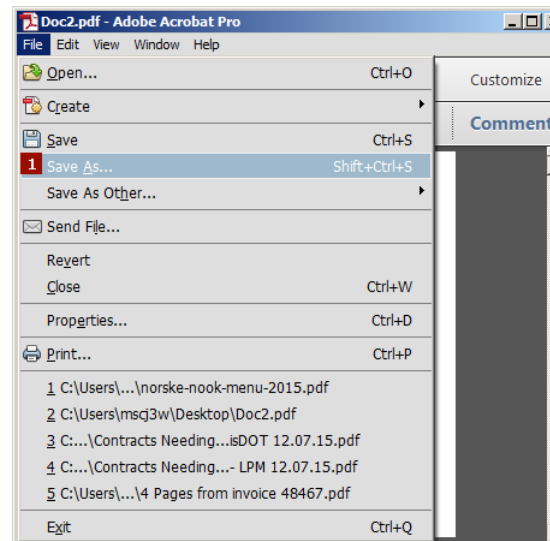
Option 1



Option 2: Save As...

1. On the **File** menu, select **Save As...**. Acrobat opens the **Save As** dialog box.

Option 2



Option 2: Save As...- continued

2. In the **Save as type** field, select PDF/A (*.pdf).
3. Continue saving the file as you normally would.

