aurigo® MASTERworks®

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Aurigo Software Technologies Inc.

Consultant Administrator Guide

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Introduction

Masterworks allows you to create consultant user accounts, add key staff details, and add past project details of the firm. For Masterworks to work effectively, it is recommended to follow the below sequence of tasks:

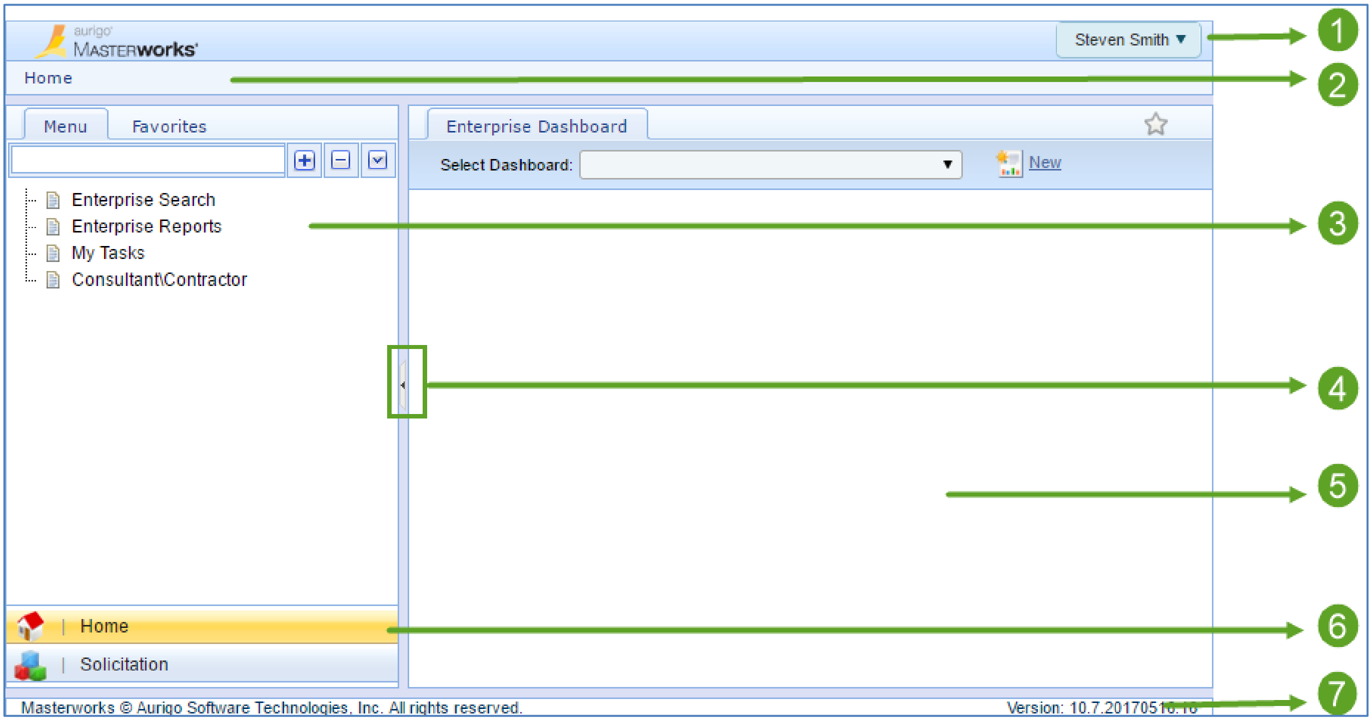
1. Create user accounts
2. Add key staff details
3. Add details of past projects

You can view consultant reports and bimonthly solicitation details. Additionally, you can view the details of the direct cost types based on the approved Consultant Financial Reports (CFR).

WisDOT CFR users update consultants approved indirect cost type based on CFR approval.

1 Understanding the User Interface

This section describes the elements of the Masterworks user interface.



The user interface of Masterworks contains various elements that have been described below:

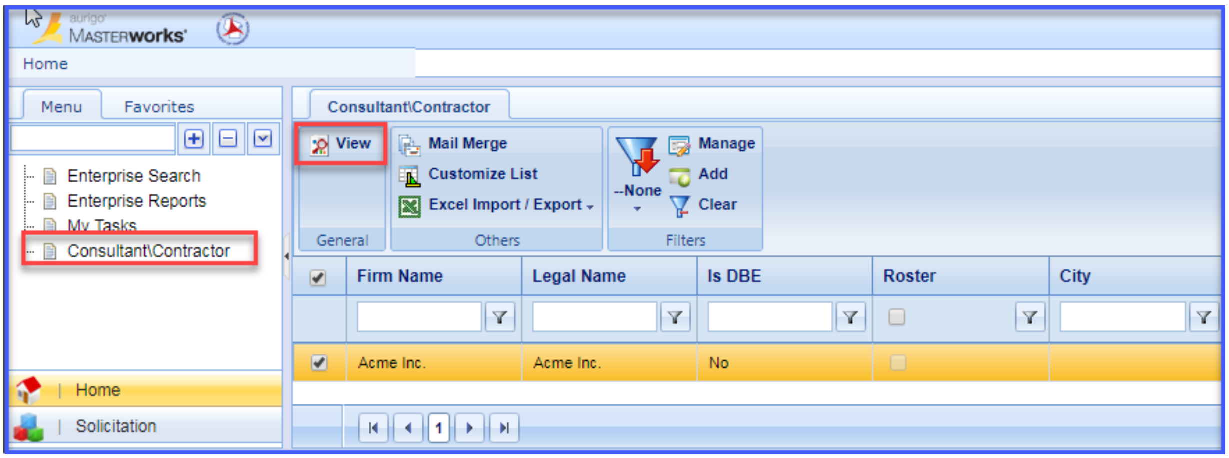
No.	Item	Description
1	User Name, Profile, Help, Logout	Displays your user name. You can view your account profile, access help files, and logout from here.
2	Breadcrumbs	Displays the navigation path to your current page.
3	Left Pane	Navigation tree.
4	Toggle button	Buttons to show or hide and resize the panes. Docking the left pane provides more space to view information in the right pane.
5	Right Pane	The work area to view forms and reports, and enter form information.
6	Module Menu	Buttons to access the various modules of Masterworks.
7	Status bar	Displays the copyright and version number of the application.

2 Creating Consultant User Accounts

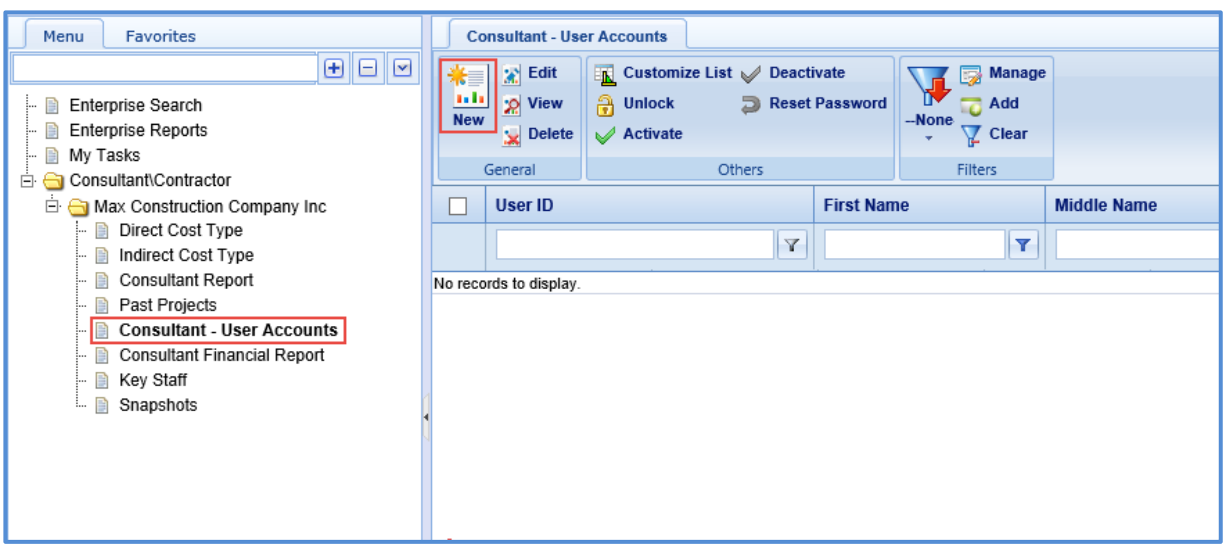
You can create user accounts for consultants to provide access to Masterworks with valid login details. The system will authenticate the login details when a user logs on to the application and provides access.

Steps:

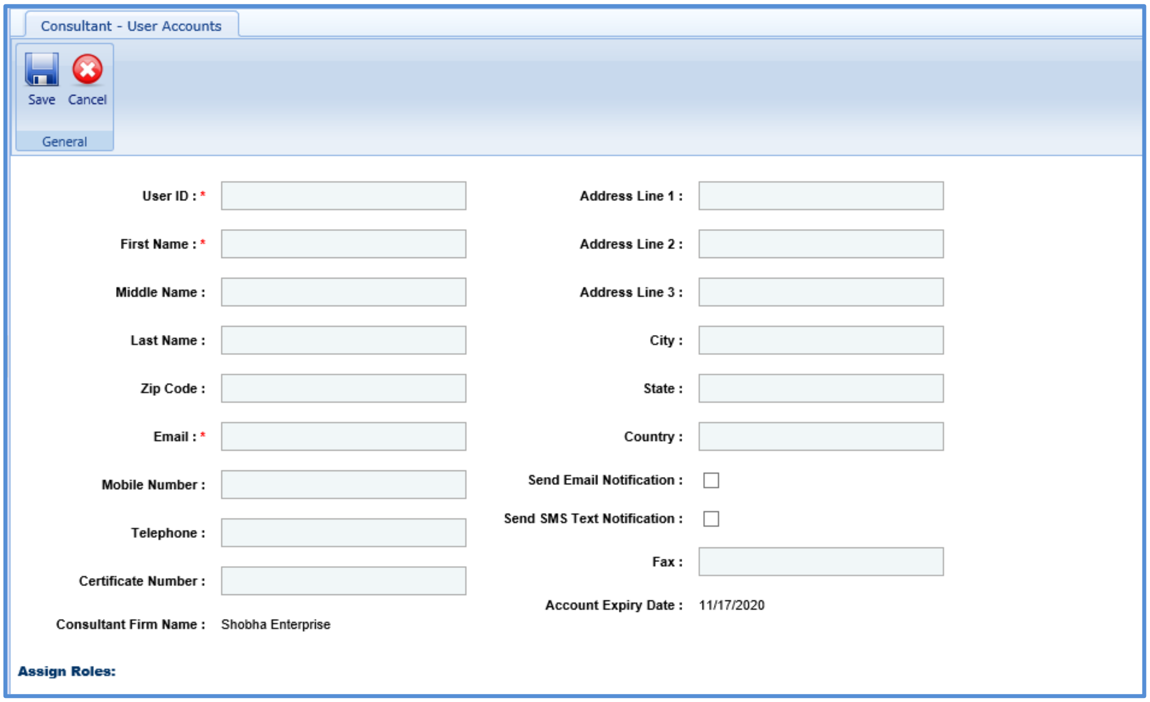
1. In the module menu, click **Home**. The **Enterprise Dashboard** is displayed.
2. In the navigation pane, click **Consultant\Contractor**. The **Consultant\Contractor** page is displayed.
3. Select the Consultant\Contractor record and click **View**.



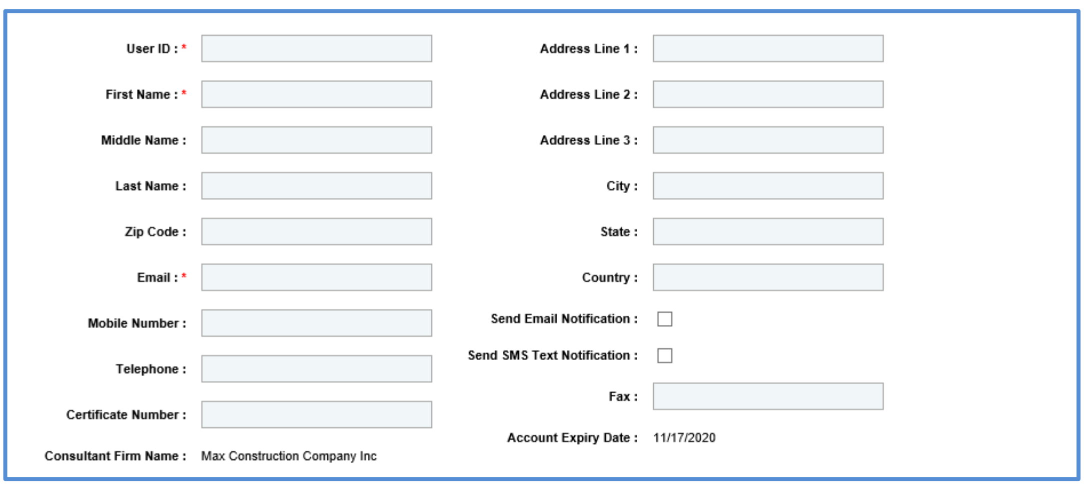
4. In the navigation pane, in the consultant\contractor record folder, click **Consultant - User Accounts.** The **Consultant - User Accounts** list page is displayed.



5. Click **New**. The **Consultant - User Accounts** details page is displayed.

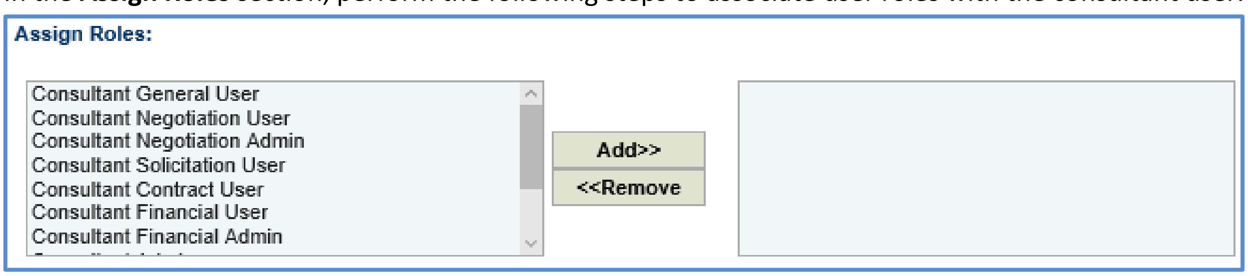


6. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory/Non-mandatory	Description
		
User ID	Mandatory	Enter a unique alphanumeric name to identify the user. This is the login ID.
First Name	Mandatory	Enter the first name of the user.
Middle Name	Non-mandatory	Enter the middle name of the user.
Last Name	Non-mandatory	Enter the last name of the user.
Address Line 1, 2 and 3	Non-mandatory	Enter the communication address of the user.
City	Non-mandatory	Enter the name of the city in which the user resides.

Field	Mandatory/Non-mandatory	Description
Zip Code	Non-mandatory	Enter the zip code of the city.
State	Non-mandatory	Enter the name of the State to which the residing city of the user belongs.
Email	Mandatory	Enter a valid e-mail address of the user for communication.
Country	Non-mandatory	Enter the name of the Country to which the residing state of the user belongs.
Mobile Number	Non-mandatory	Enter the mobile number of the user.
Send Email Notification	Non-mandatory	Select the check box to send an email notification with login details to the user.
Telephone	Non-mandatory	Enter the contact telephone number of the user.
Send SMS Text Notification	Non-mandatory	Select the check box to send an SMS notification with login details to the user.
Certificate Number	Non-mandatory	Enter the access certificate number assigned to the user.
Fax	Non-mandatory	Enter the FAX number of the user for facsimile communication.
Consultant Firm Name	-	The name of the consultant firm is auto-populated.
Account Expiry Date	-	The expiry date of the user account is auto-populated. The user is denied access to the application after this date.

7. In the **Assign Roles** section, perform the following steps to associate user roles with the consultant user.



   a. From the Roles list, click the required user role to associate with the consultant user. To select multiple roles, you can press **Ctrl** on the keyboard, and then click the required roles to select multiple roles.

   b. Click **Add>>** to include the role in the corresponding box.
   The selected roles are associated with the user account and made available to the user.

8. Click **Save**.

2.1 Resetting User Account Password

You can change the password of an existing consultant user account for administrative purposes and send the new password details to the user.

Steps:

1. On the **Consultant - User Accounts** list page, select the user account for which the password has to be reset.

2. In the **Others** group, click **Reset Password**. A dialog box to confirm the reset of password is displayed.
3. Click **OK**.

2.2 Activating/Deactivating User Account

The system allows you to deactivate a user account or activate a deactivated user account for administrative or other valid reasons.

A user with a deactivated account is not permitted to access the application. All details of the account is retained and available.

2.2.1 Deactivating a User Account

1. On the **Consultant - User Accounts** list page, select the user account that has to be deactivated.

2. In the **Others** group, click **Deactivate**. A dialog box to confirm deactivation of the user account is displayed.
3. Click **OK**.

2.2.2 Activating a Deactivated User Account

1. On the **Consultant - User Accounts** list page, select the deactivated user account that has to be activated.

2. In the **Others** group, click **Activate**. A dialog box to confirm activation of the user account is displayed.
3. Click **OK**.

2.3 Unlocking User Account

Masterworks automatically locks a user account when a user fails to enter the correct login details within the specified number of maximum failed attempts that are allowed in the system. The user will not be able to log in until the account is reset and hence, must make a request to the administrator via e-mail or any other mode of communication.

You can reset or unlock the account after relevant clarifications are sought from the user regarding the erroneous login attempts.

Steps:

1. On the **Consultant - User Accounts** list page, select the locked user account that has to be unlocked.

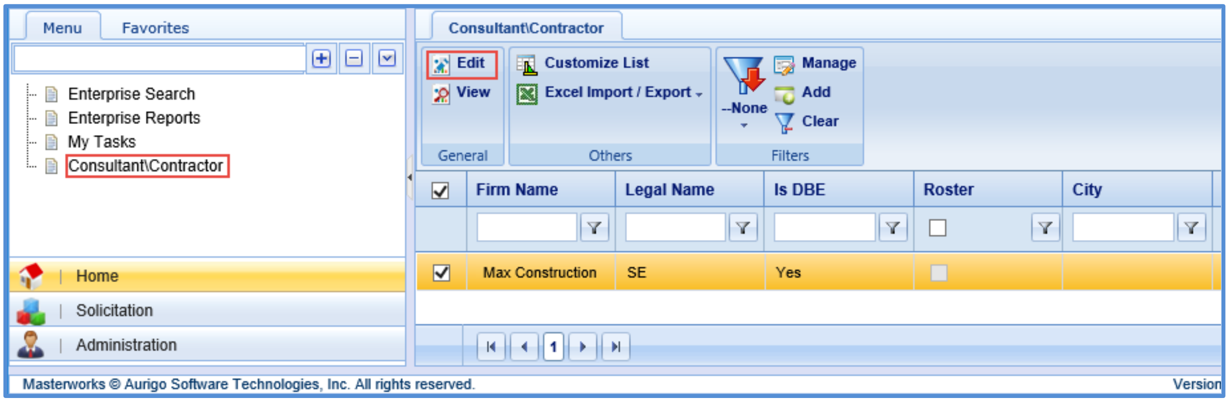
2. In the **Others** group, click **Unlock**. A dialog box to confirm unlocking of the user account is displayed.
3. Click **OK**.

3 Adding Key Staff Details

The system allows you to add key staff details.

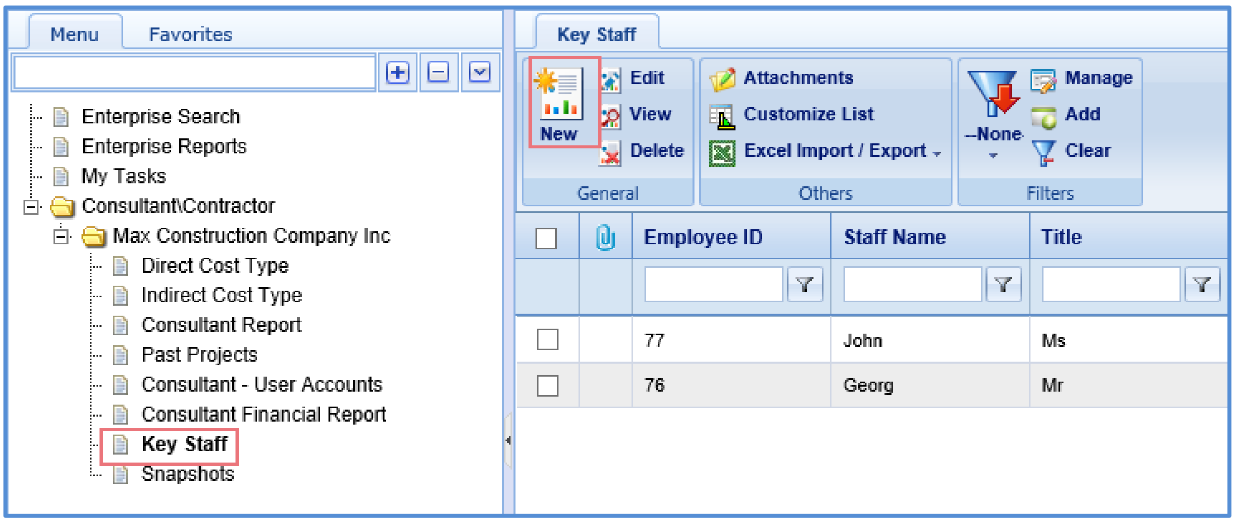
Steps:

1. In the module menu, click **Home**. The **Enterprise Dashboard** is displayed.
2. In the navigation pane, click **Consultant\Contractor**. The **Consultant\Contractor** page is displayed.

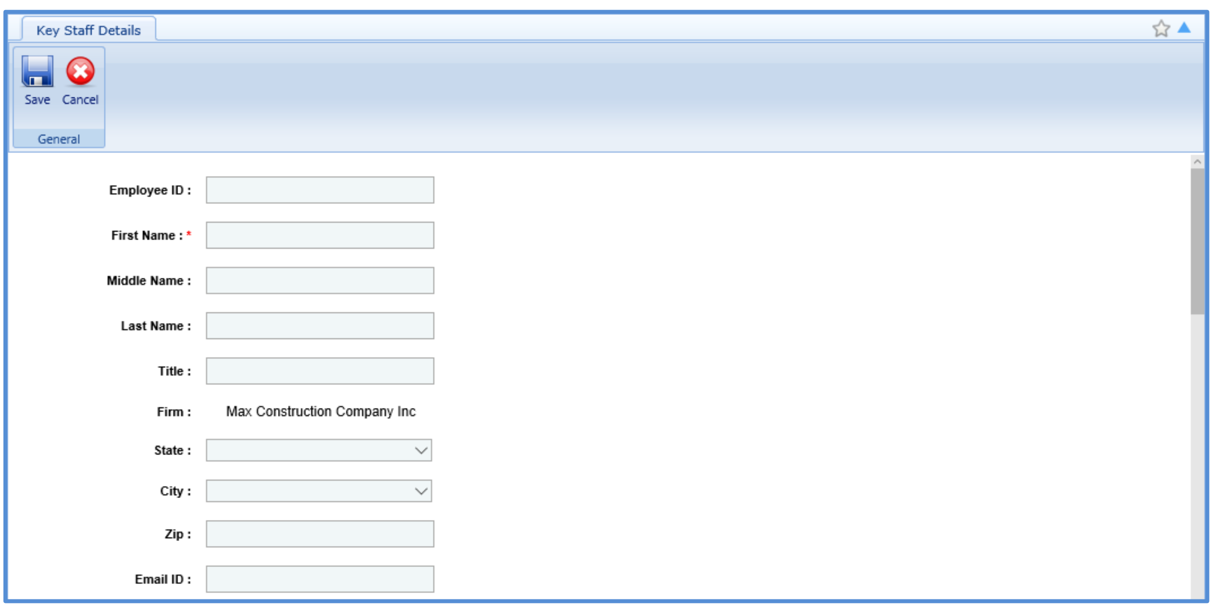


3. Select the Consultant\Contractor record and click **Edit**.

4. In the navigation pane, in the consultant\contractor record folder, click **Direct Cost Type.** The **Direct Cost Type** list page is displayed.

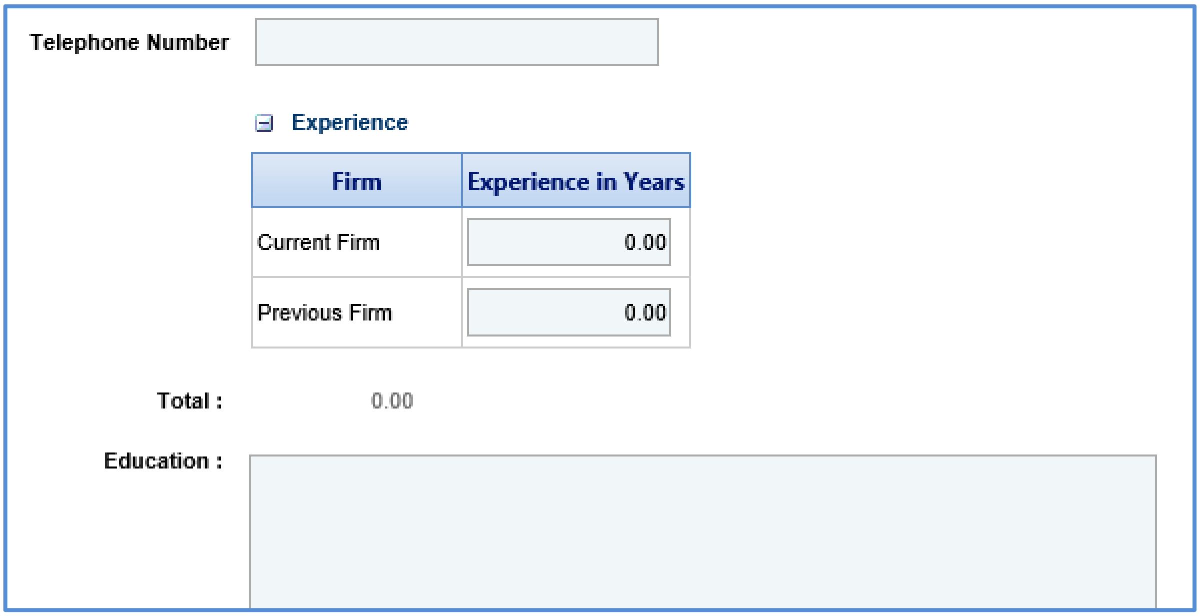


5. Click **New**. The **Key Staff Details** page is displayed.

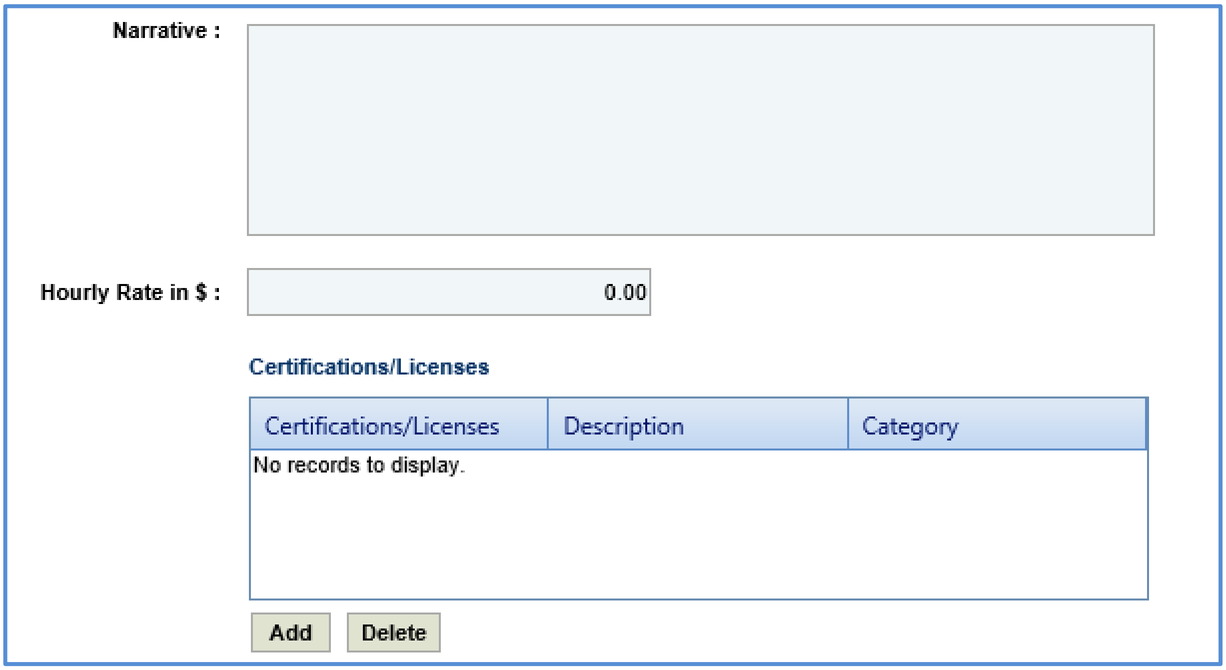


6. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory/ Non-mandatory	Description
		
Employee ID	Non-mandatory	Enter the unique employee ID of the key staff.
First Name	Mandatory	Enter the first name of the key staff.
Middle Name	Non-mandatory	Enter the middle name of the key staff.
Last Name	Non-mandatory	Enter the last name of the key staff.
Title	Non-mandatory	Enter the title of the key staff.
Firm	-	The firm name of the key staff is auto-populated.
State	Non-mandatory	From the drop-down list, select the State to which the residing city of the key staff belongs.
City	Non-mandatory	Enter the name of the city in which the key staff resides.
Zip	Non-mandatory	Enter the zip code of the city.
Email ID	Non-mandatory	Enter a valid e-mail address of the key staff for communication.



Field	Mandatory/ Non-mandatory	Description
Telephone Number	Non-mandatory	Enter the telephone number of the key staff.
Experience	Non-mandatory	Enter experience details of the key staff. • Current Firm: Enter number of years of experience in the current firm. • Previous Firm: Enter number of years of experience in the previous firm.
Total	-	The total number of years of experience is auto-calculated and displayed based on the values entered in the **Experience** field.
Education	Non-mandatory	Enter the education details of the key staff.

Field	Mandatory/ Non-mandatory	Description
		
Narrative	Non-mandatory	Enter narration about the key staff.
Hourly Rate in $	Non-mandatory	Enter the hourly rate of the key staff.
Certificate/Licenses	Non-mandatory	To add certifications/licenses details: 1. Click **Add**. The **Certifications/Licenses** dialog box is displayed. 2. Select the required certifications/licenses and then click **Select**.

7. In the **Attachments** section, upload images and files relevant to the past project. For information on form attachments, refer *Attachments*.

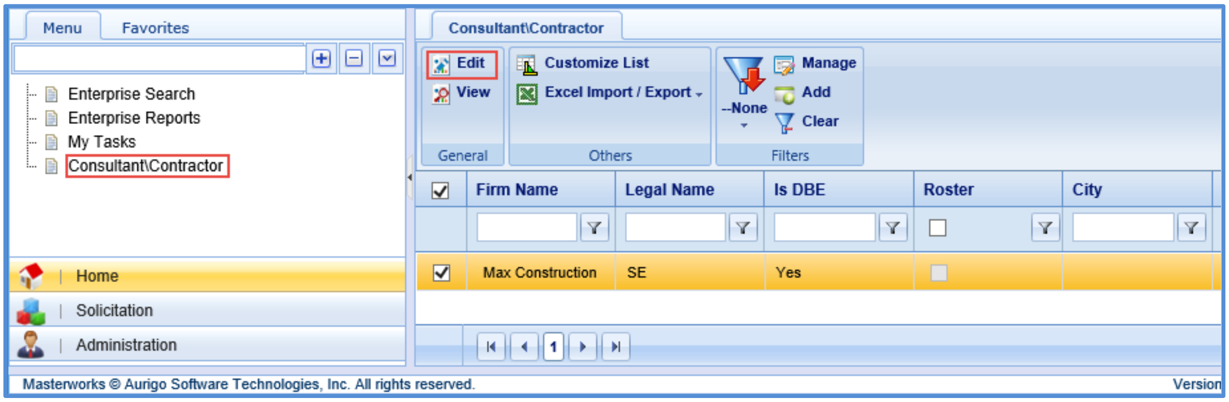
8. Click **Save**.

4 Adding Past Projects Details

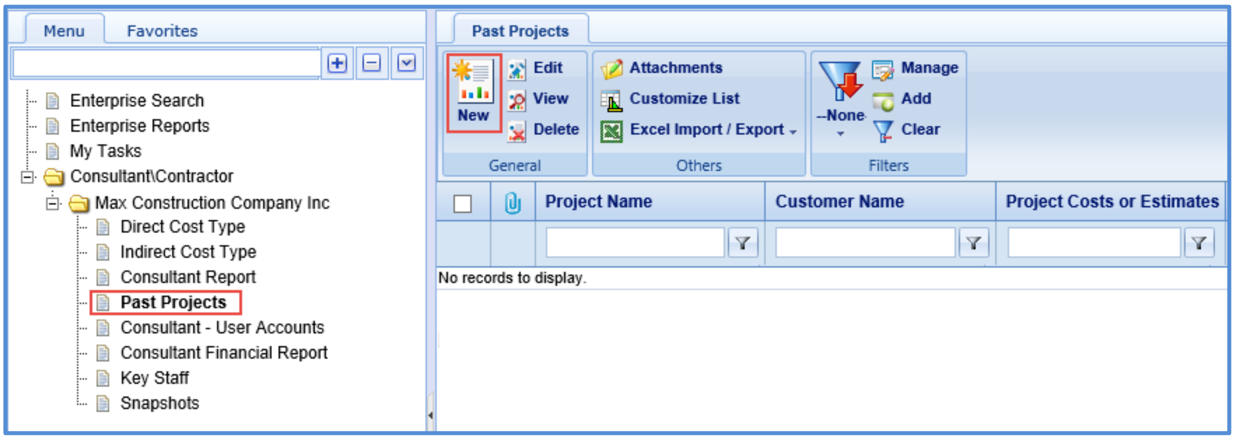
The system allows you to add past project details of the consultant firm.

Steps:

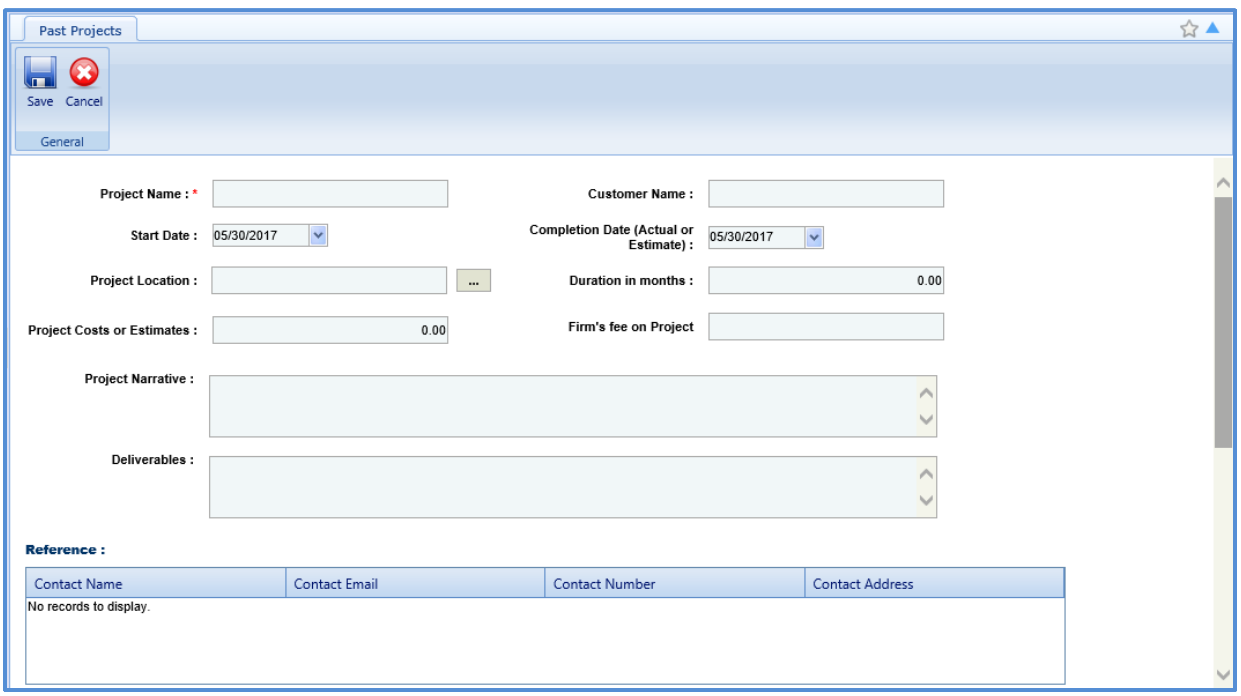
1. In the module menu, click **Home**. The **Enterprise Dashboard** is displayed.
2. In the navigation pane, click **Consultant\Contractor**. The **Consultant\Contractor** page is displayed.
3. Select the Consultant\Contractor record and click **Edit**.



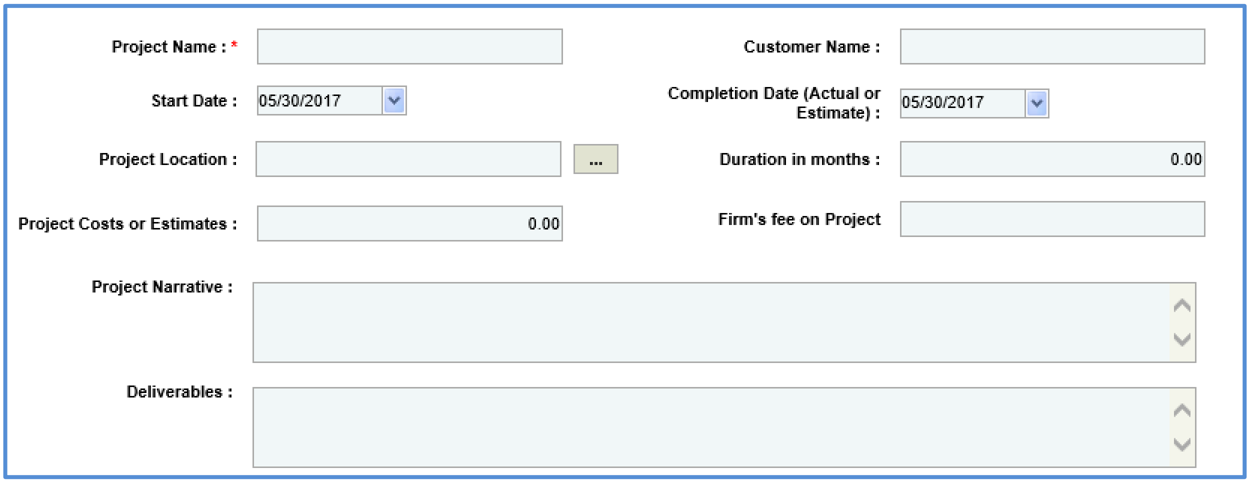
4. In the navigation pane, in the consultant\contractor record folder, click **Past Projects.** The **Past Projects** list page is displayed.



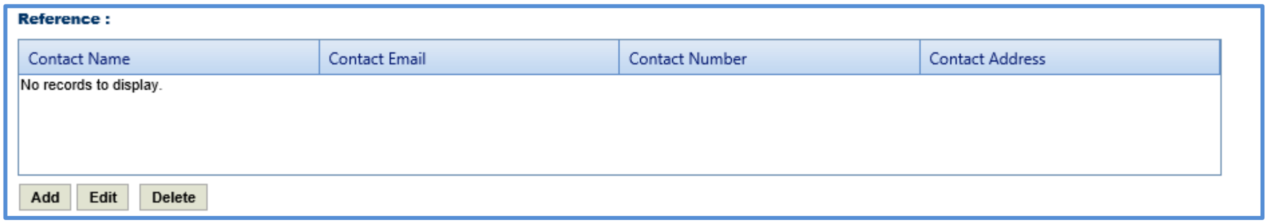
5. Click **New**. The **Past Projects** details page is displayed.



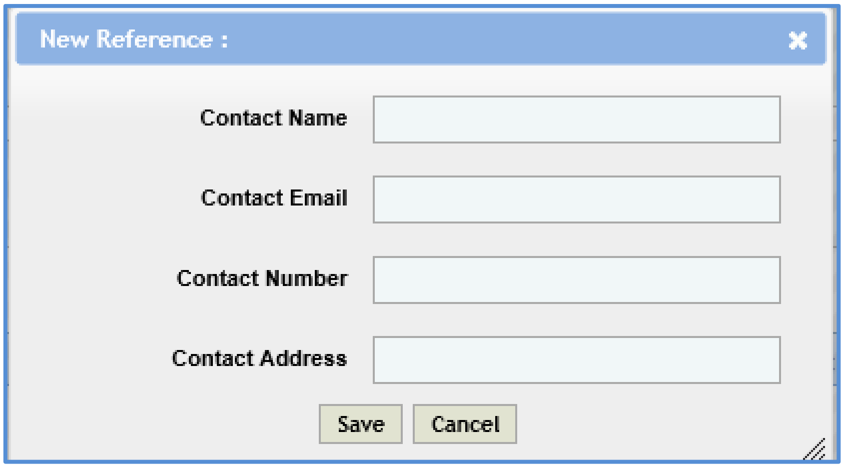
6. Enter information in the required fields. The fields are described in the following table.

Field	Mandatory/Non-mandatory	Description
		
Project Name	Mandatory	Enter the name of the past project.
Customer Name	Non-mandatory	Enter the name of the customer of the past project.
Start Date	Non-mandatory	From the drop-down calendar, select the start date of the past project.
Completion Date (Actual or Estimate)	Non-mandatory	From the drop-down calendar, select the date when the past project was completed. The date can be an actual completion date or estimated completion date.
Project Location	Non-mandatory	To select the location where the past project was executed: 1. Click ... and the **Project Location** dialog box is displayed. 2. Select the required project location and then click **Select**.
Duration in months	Non-mandatory	Enter the duration in months of the past project.
Project Costs or Estimates	Non-mandatory	Enter the past project cost amount or project estimate amount.
Firm's fee on Project	Non-mandatory	Enter the consultant firm fee received for the past project.
Project Narrative	Non-mandatory	Enter the narration of the past project.
Deliverables	Non-mandatory	Enter the deliverable details of the past project.

7. In the **Reference** section, perform the following steps to add reference contact details of the past project.



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

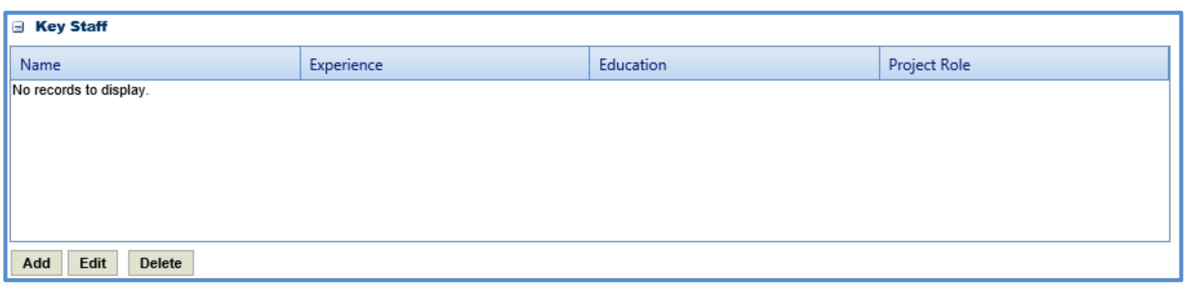


b. Enter information in the required fields. The different fields are described in the following table.

Field	Description
Contact Name	Enter the name of the reference contact.
Contact Email	Enter the e-mail ID of the reference contact.
Contact Number	Enter the reference contact number.
Contact Address	Enter the reference contact address.

c. Click **Save**.

8. In the **Key Staff** section, perform the following steps to add key staff details of the past project.



a. Click **Add**. The **Key Staff** dialog box listing all the key staff details is displayed.

b. Select the required key staff details and click **Select**.

9. In the **Attachments** section, upload images and files relevant to the past project. For information on form attachments, refer *Attachments*.

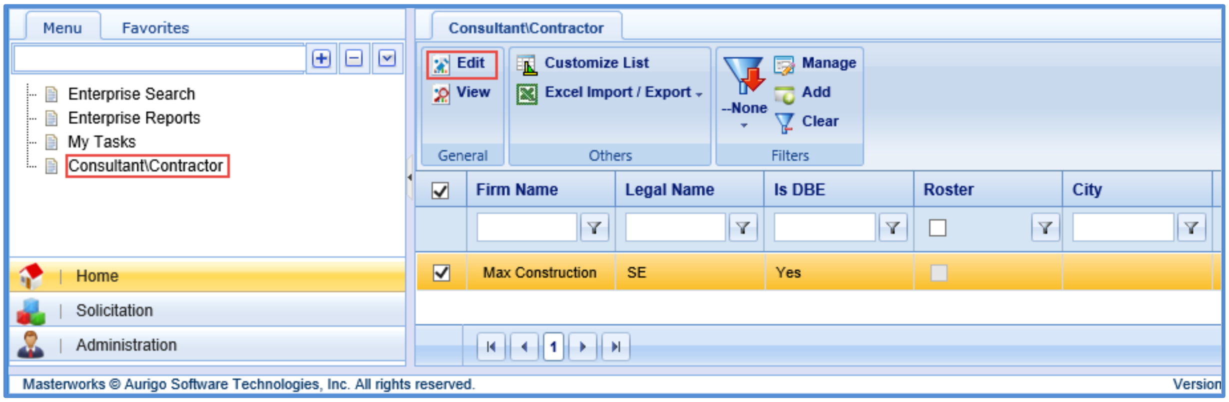
10. Click **Save.**

5 Viewing Direct Cost Type

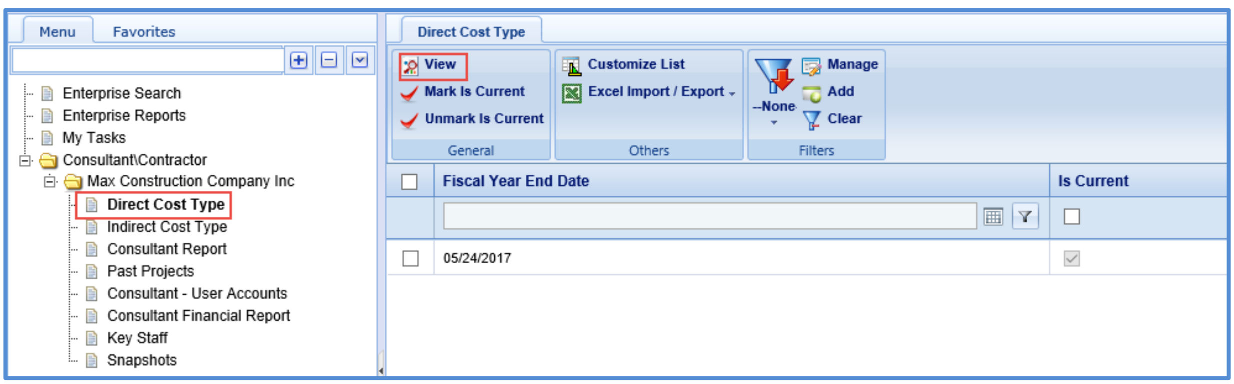
The system allows you to view the direct cost types associated with the approved Consultant Financial Report.

Steps:

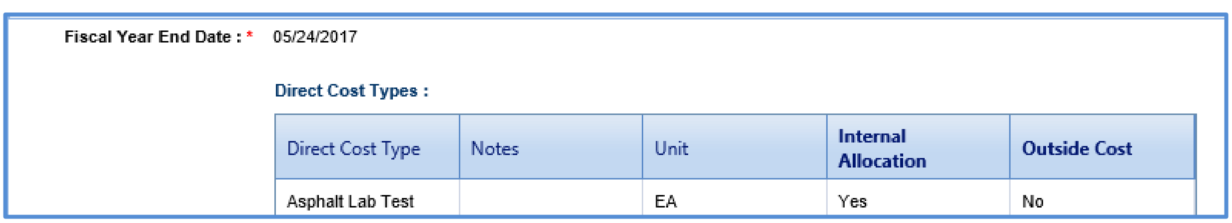
1. In the module menu, click **Home**. The **Enterprise Dashboard** is displayed.
2. In the navigation pane, click **Consultant\Contractor**. The **Consultant\Contractor** page is displayed.



3. Select the Consultant\Contractor record and click **Edit**.
4. In the navigation pane, in the consultant\contractor record folder, click **Direct Cost Type.** The **Direct Cost Type** list page is displayed.

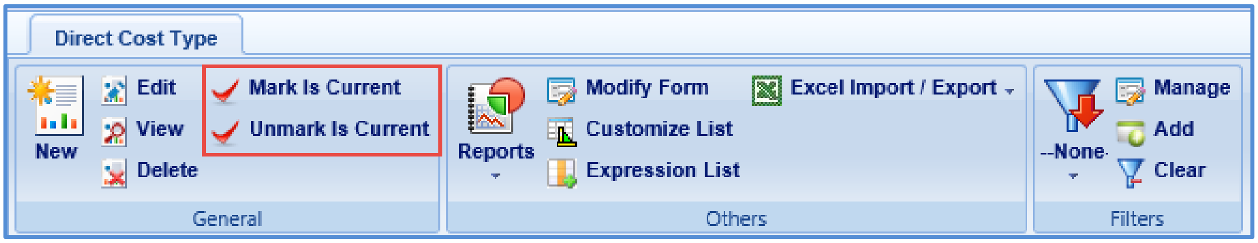


5. Select a record and click **View**. The **Direct Cost Type** details page is displayed. The details displayed are described in the following table.

<table>
<tr><th>Details</th><th>Description</th></tr>
<tr><td colspan="2">
</td></tr>
<tr><td>Fiscal Year End Date</td><td>Indicates the fiscal year end date associated with the direct cost type.</td></tr>
<tr><td>Direct Cost Types</td><td>Indicates type of direct cost, notes about direct cost type, unit associated with the direct cost, whether associated with internal allocation, and whether associated with outside cost.</td></tr>
</table>

Note:

- *You can mark a direct cost type as the current direct cost type, on the **Direct Cost Type** list page, select the direct cost type record, which you want to mark as current and click **Mark Is Current**.*



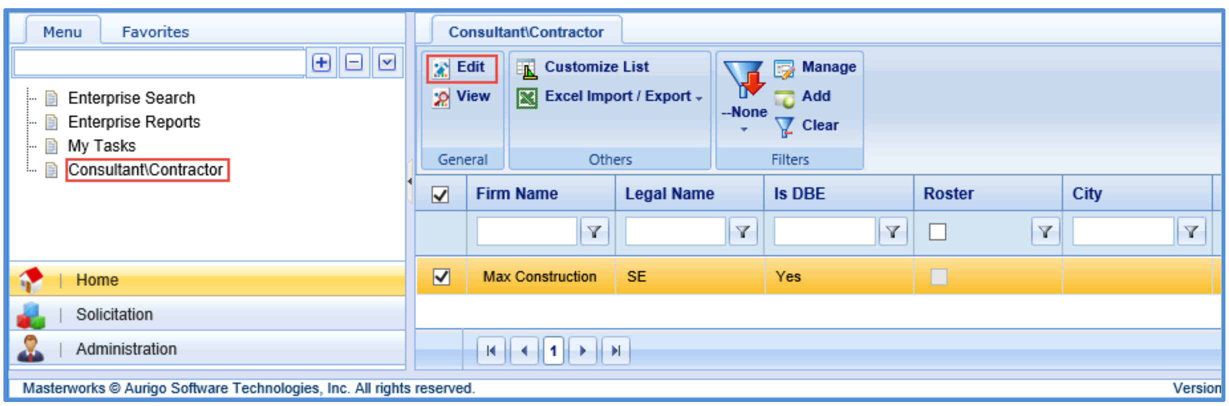
- *To unmark the direct cost type marked as the current direct cost type, click the marked direct cost, and then click **Unmark Is Current**.*

6 Viewing Indirect Cost Types

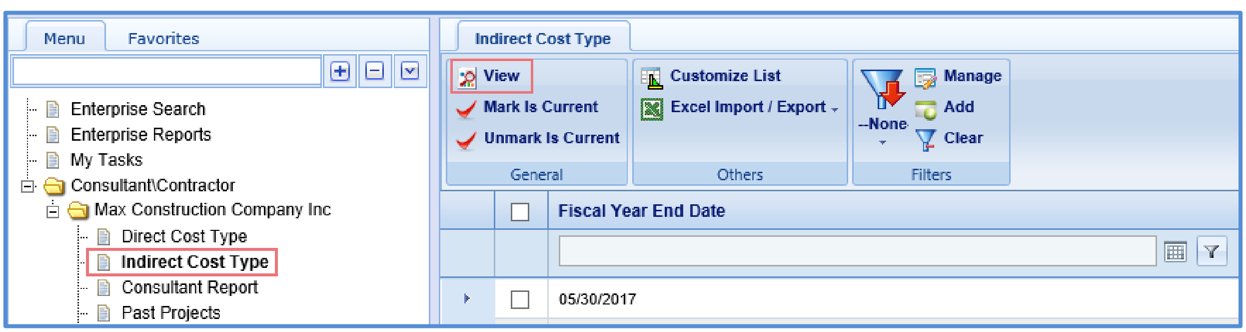
The system allows you to view indirect cost types associated with the firm.

Steps:

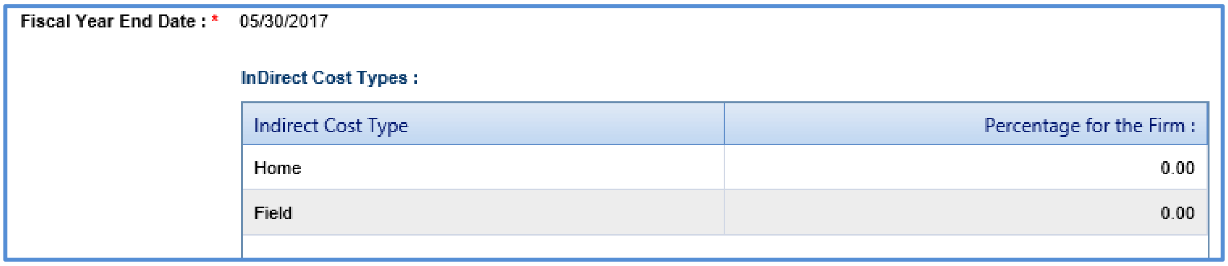
1. In the module menu, click **Home**. The **Enterprise Dashboard** is displayed.
2. In the navigation pane, click **Consultant\Contractor**. The **Consultant\Contractor** page is displayed.
3. Select the Consultant\Contractor record and click **Edit**.



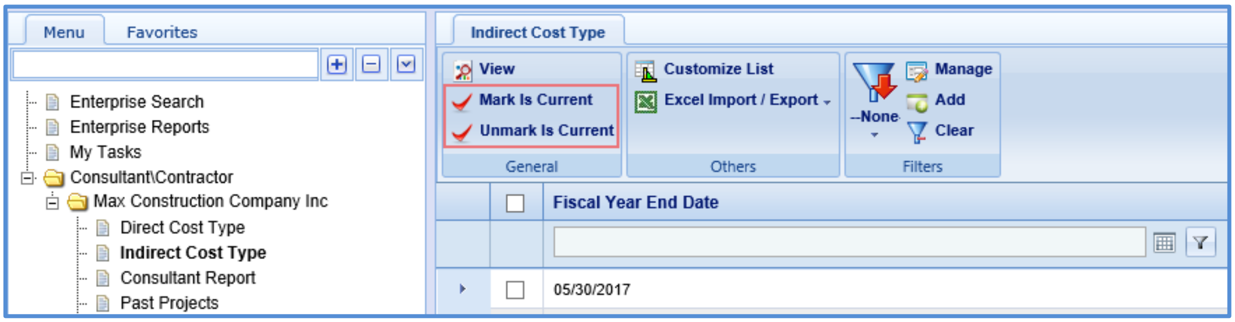
4. In the navigation pane, in the consultant\contractor record folder, click **Indirect Cost Type.** The **Indirect Cost Type** list page is displayed.



5. Select a record and then click **View**. The **Indirect Cost Type** details page is displayed. The details are described in the following table.

Details	Description
	
Fiscal Year End Date	Indicates the fiscal year end date associated with the indirect cost type.
InDirect Cost Types	Indicates type of indirect cost and percentage for the firm for each type.

Note: *You can mark a indirect cost type as the current indirect cost type, on the* ***Indirect Cost Type*** *list page, select the indirect cost type record, which you want to mark as current and click* ***Mark Is Current****.*



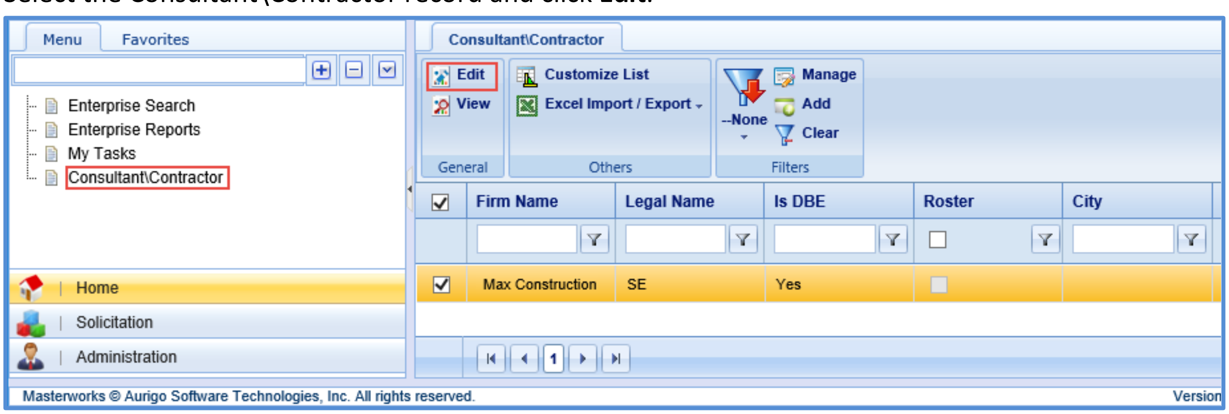
To unmark the indirect cost type marked as the current indirect cost type, click the marked indirect cost type, and then click ***Unmark Is Current****.*

7 Viewing Consultant Reports

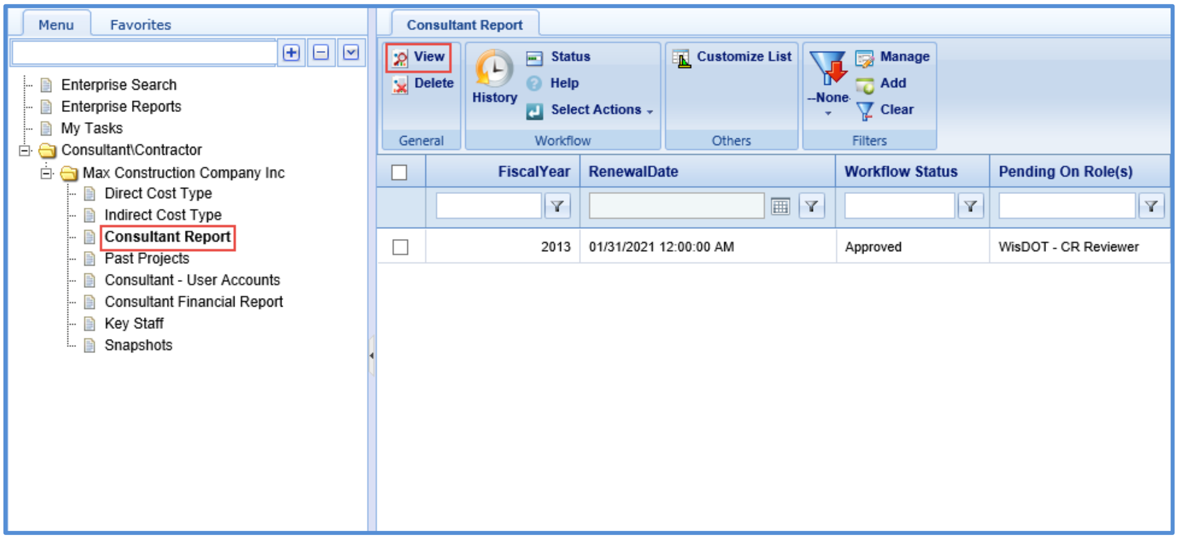
The system allows you to view the consultant report details.

Steps:

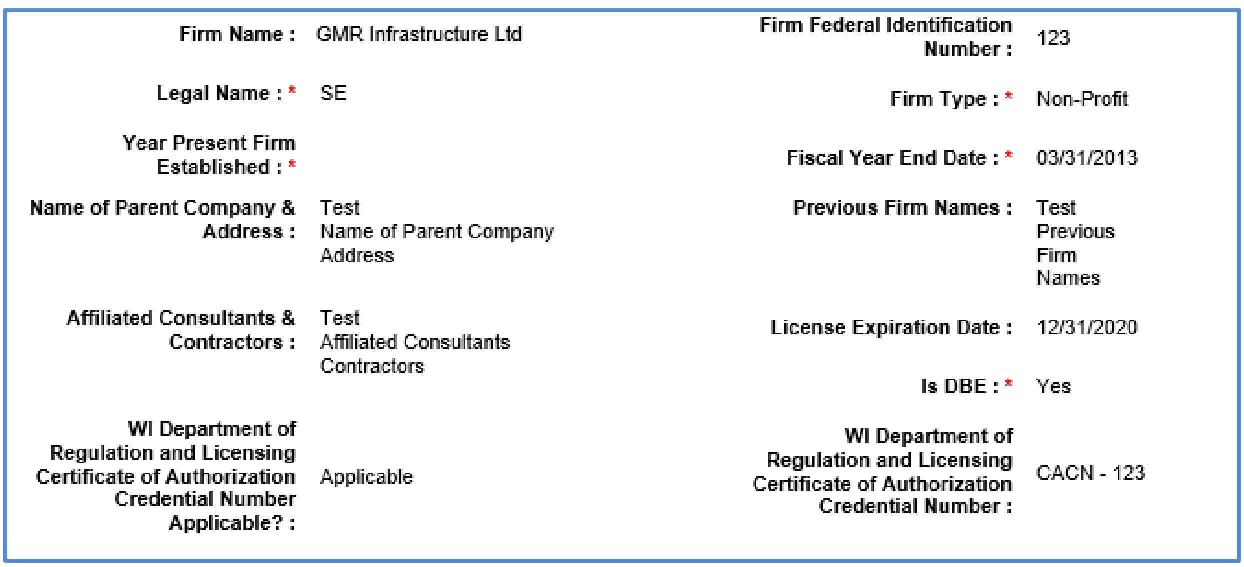
1. In the module menu, click **Home**. The **Enterprise Dashboard** is displayed.
2. In the navigation pane, click **Consultant\Contractor**. The **Consultant\Contractor** page is displayed.
3. Select the Consultant\Contractor record and click **Edit**.



4. In the navigation pane, in the consultant\contractor record folder, click **Consultant Report.** The **Consultant Report** list page is displayed.

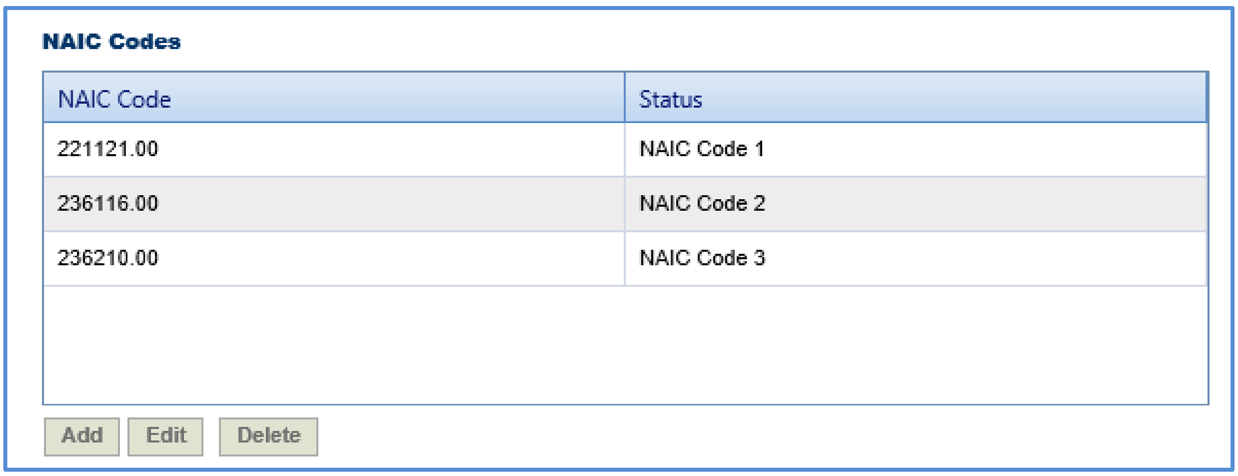


5. Click **View**. The **Consultant Report** details page is displayed. The details displayed are described in the following table.

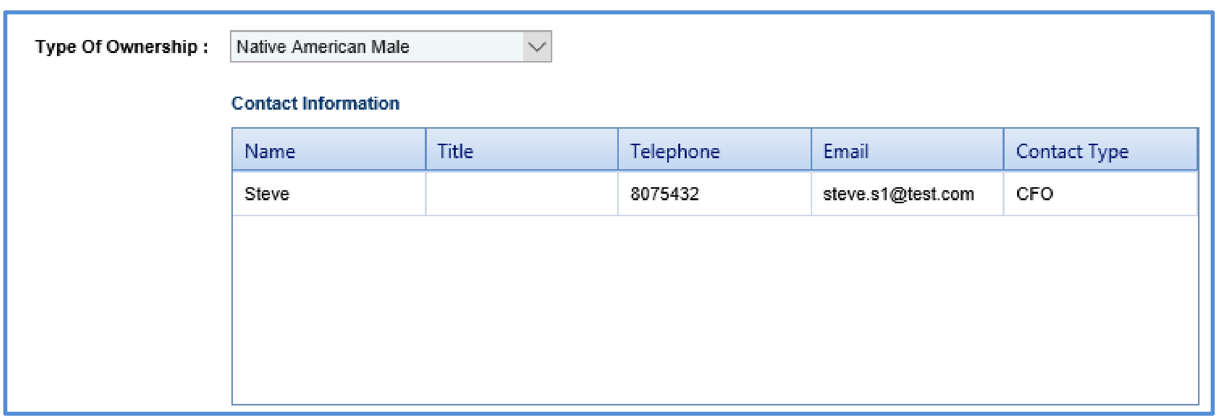


Details	Description
Firm Name	Indicates the name of the consultant firm.
Firm Federal Identification Number	Indicates the federal identification number of the consultant firm.
Legal Name	Indicates the legal name of the consultant firm.
Firm Type	Indicates the type of the consultant firm.
Year Present Firm Established	Indicates the year the current consultant firm was established.
Fiscal Year End Date	Indicates the end date of the fiscal year.
Name of Parent Company & Address	Indicates the name and address of the parent company.
Previous Firm Names	Indicates the previous firm names.

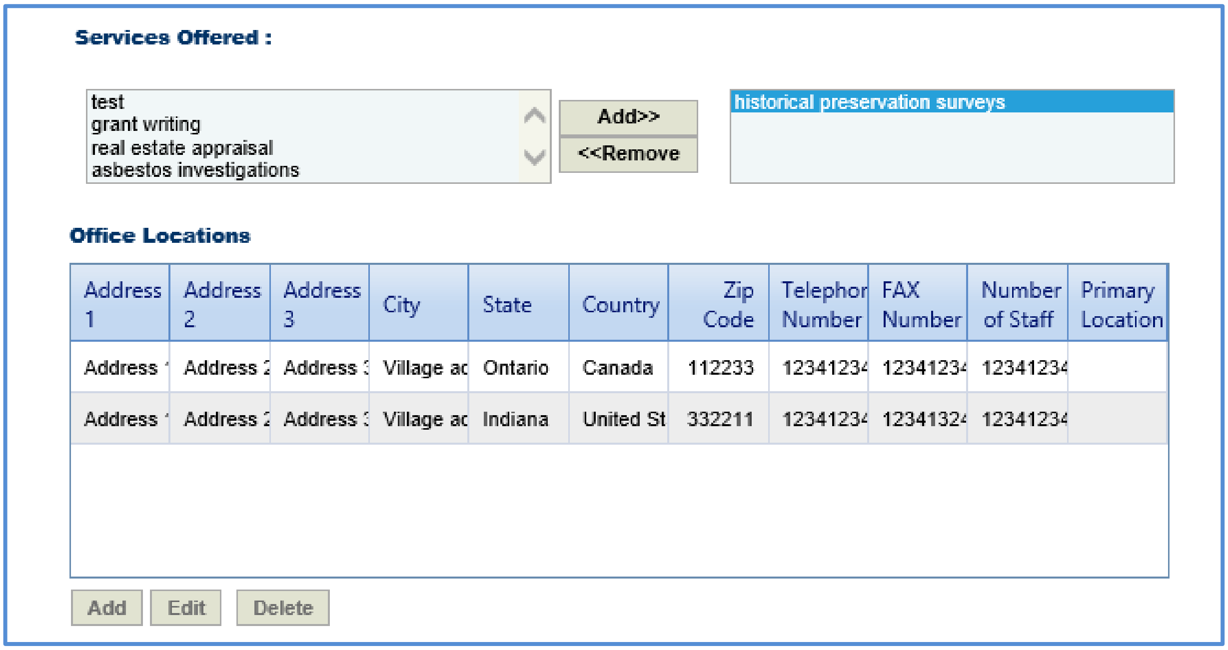
Details	Description
Affiliated Consultants & Contractors	Indicates affiliated consultants and contractors details.
License Expiration Date	Indicates license expiry date of the consultant firm.
WI Department of Regulation and Licensing Certificate of Authorization Credential Number Applicable?	Indicates whether WI department regulation and licensing certificate of authorization credential number is applicable or not.
Is DBE	Indicates whether the consultant firm is a DBE or not.
WI Department of Regulation and Licensing Certificate of Authorization Credential Number	Indicates the WI department of regulation and licensing certificate of authorization credential number.



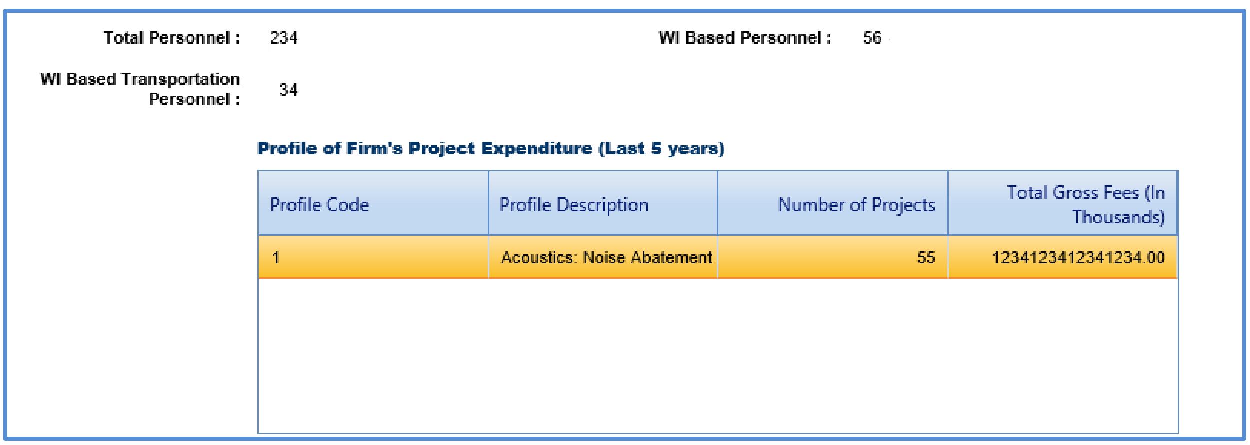
NAICS Codes	If the consultant firm is DBE, then indicates the NAICS Codes of the consultant firm.



Type of Ownership	Indicates the ownership type of the consultant firm.
Contact Information	Indicates the contact name, title, telephone number, e-mail ID, and contact type of the consultant firm.



Details	Description
Services Offered	Indicates the services offered by the consultant firm.
Office Locations	Indicates the addresses and contact numbers of different office locations of the consultant firm.



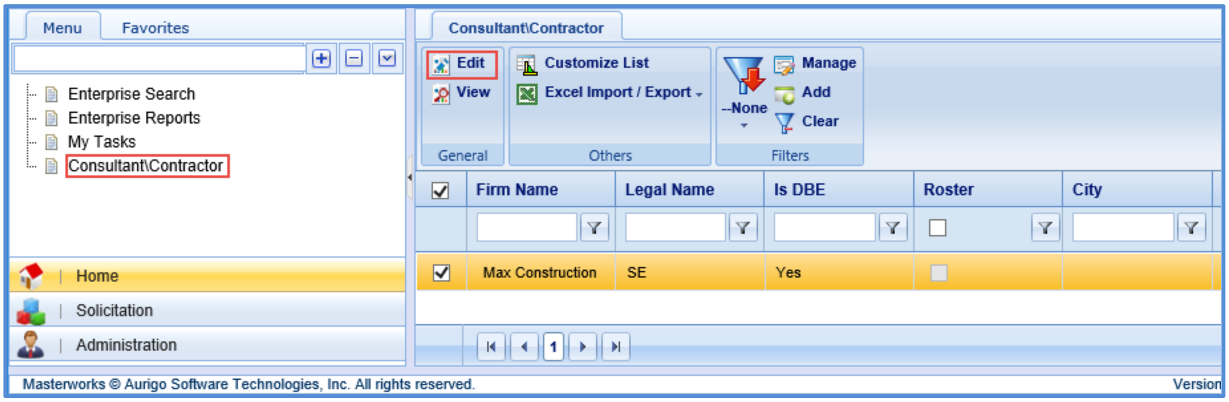
Details	Description
Total Personnel	Indicates the total number of persons in the consultant firm.
WI Based Transportation Personnel	Indicates the WI based transportation persons in the consultant firm.
WI Based Personnel	Indicates the WI based persons in the consultant firm.
Profile of Firm's Project Expenditure (Last 5 years)	Indicates the profile code, profile description, number of projects, and total gross fees of the firm's project expenditure incurred in the previous 5 years.

8 Adding Past Projects Details

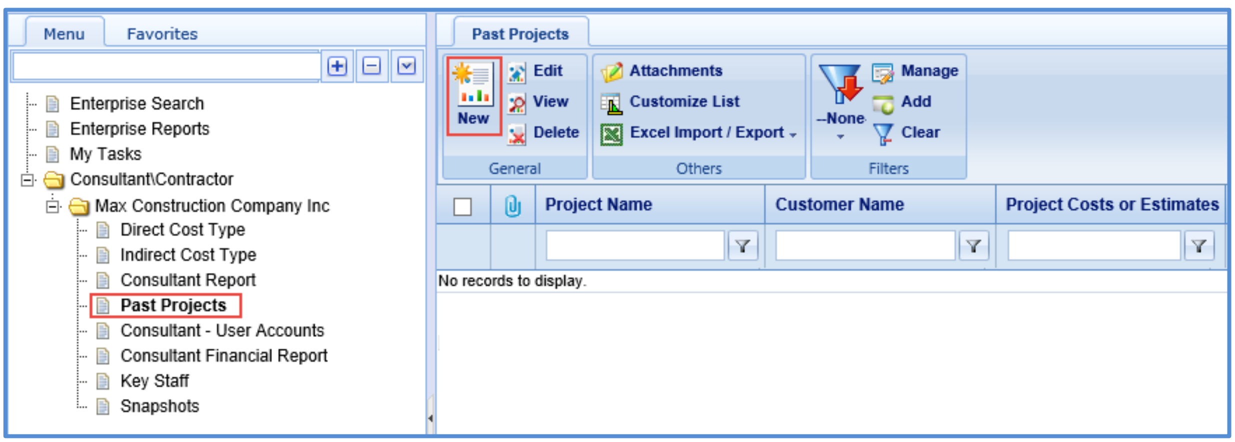
The system allows you to add past project details of the consultant firm.

Steps:

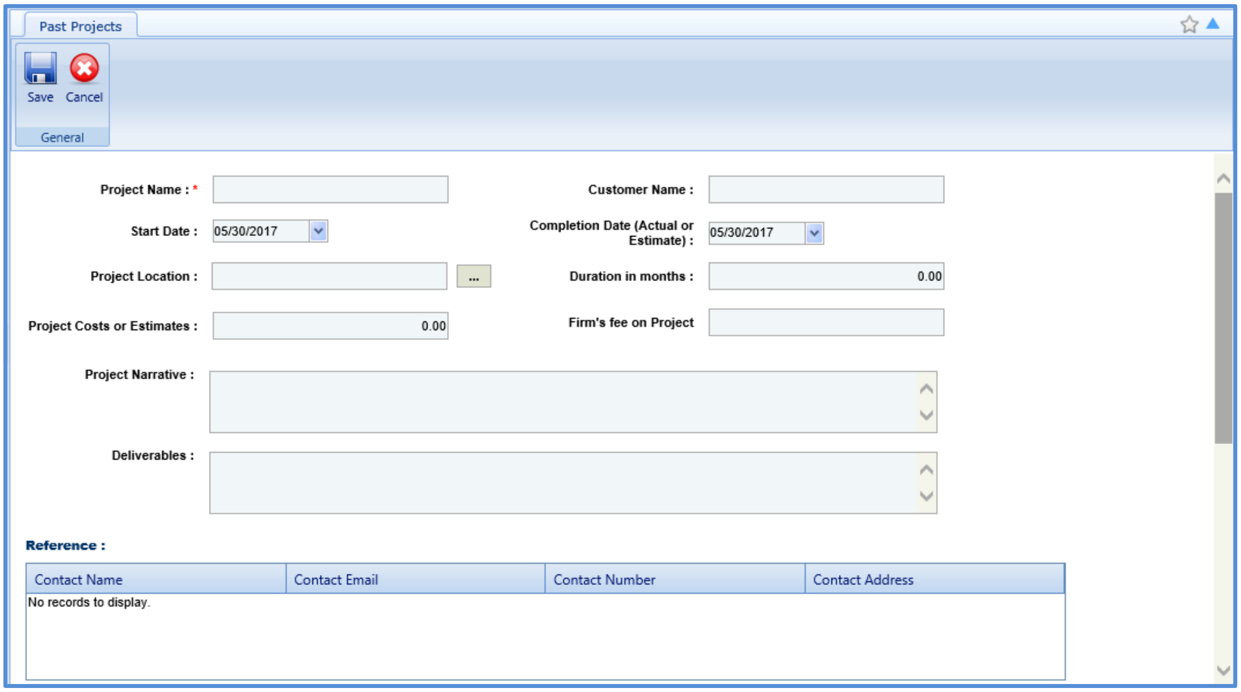
1. In the module menu, click **Home**. The **Enterprise Dashboard** is displayed.
2. In the navigation pane, click **Consultant\Contractor**. The **Consultant\Contractor** page is displayed.
3. Select the Consultant\Contractor record and click **Edit**.



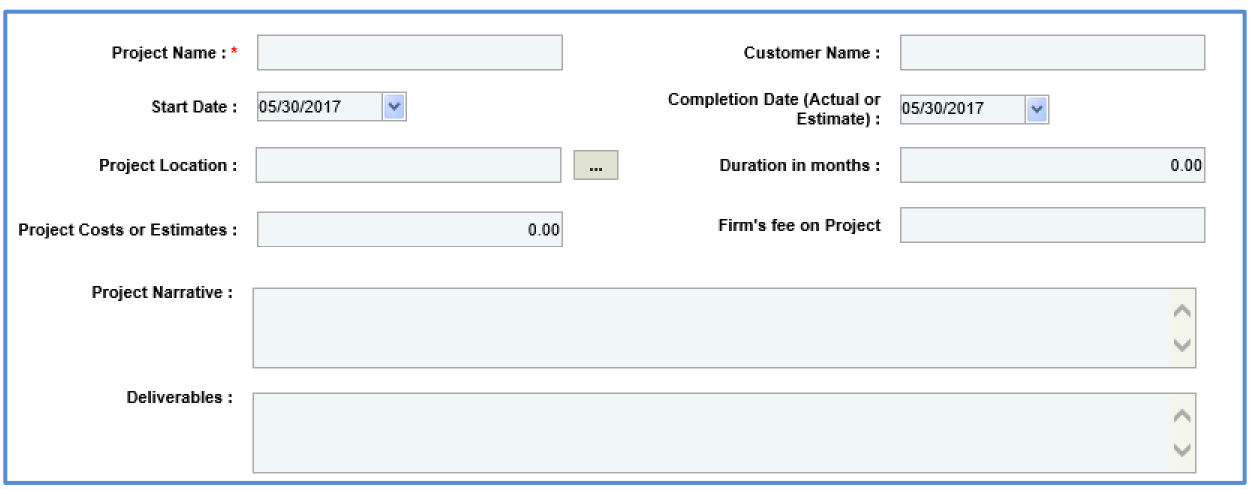
4. In the navigation pane, in the consultant\contractor record folder, click **Past Projects.** The **Past Projects** list page is displayed.



5. Click **New**. The **Past Projects** details page is displayed.

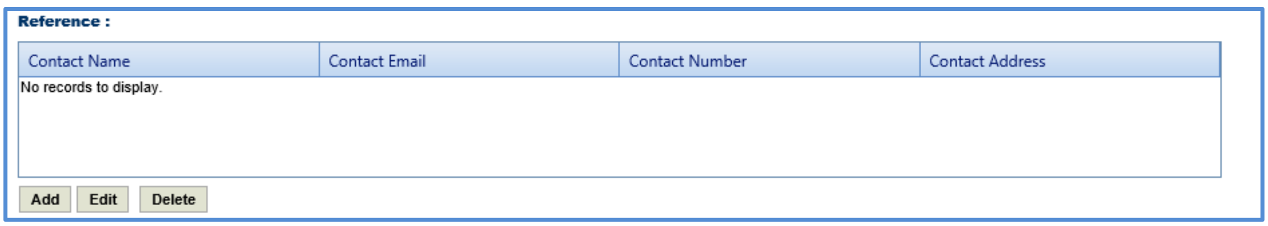


6. Enter information in the required fields. The fields are described in the following table.

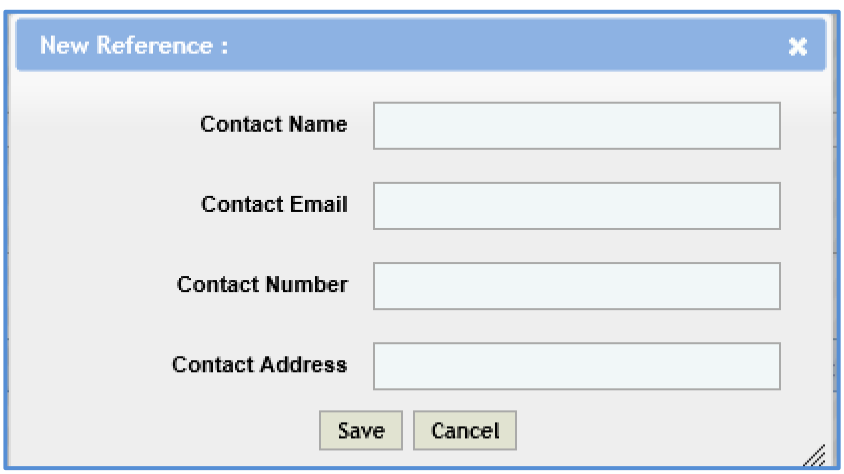
Field	Mandatory/Non-mandatory	Description
		
Project Name	Mandatory	Enter the name of the past project.
Customer Name	Non-mandatory	Enter the name of the customer of the past project.
Start Date	Non-mandatory	From the drop-down calendar, select the start date of the past project.
Completion Date (Actual or Estimate)	Non-mandatory	From the drop-down calendar, select the date when the past project was completed. The date can be an actual completion date or estimated completion date.
Project Location	Non-mandatory	To select the location where the past project was executed:

Field	Mandatory/Non-mandatory	Description
		3. Click ... and the **Project Location** dialog box is displayed. 4. Select the required project location and then click **Select**.
Duration in months	Non-mandatory	Enter the duration in months of the past project.
Project Costs or Estimates	Non-mandatory	Enter the past project cost amount or project estimate amount.
Firm's fee on Project	Non-mandatory	Enter the consultant firm fee received for the past project.
Project Narrative	Non-mandatory	Enter the narration of the past project.
Deliverables	Non-mandatory	Enter the deliverable details of the past project.

7. In the **Reference** section, perform the following steps to add reference contact details of the past project.



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

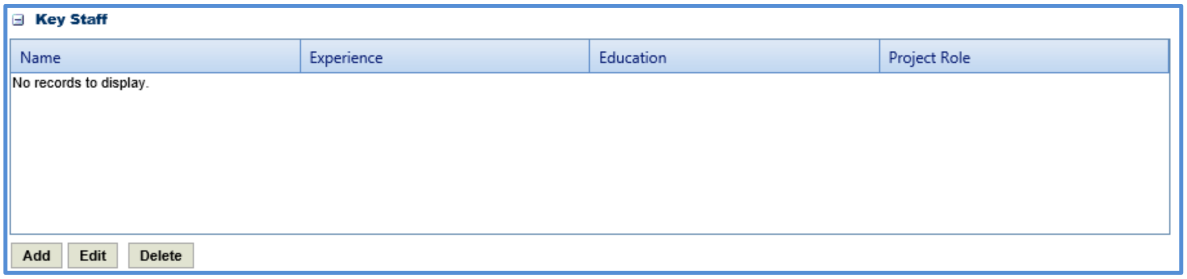


b. Enter information in the required fields. The different fields are described in the following table.

Field	Description
Contact Name	Enter the name of the reference contact.
Contact Email	Enter the e-mail ID of the reference contact.
Contact Number	Enter the reference contact number.
Contact Address	Enter the reference contact address.

c. Click **Save**.

8. In the **Key Staff** section, perform the following steps to add key staff details of the past project.



   a. Click **Add**. The **Key Staff** dialog box listing all the key staff details is displayed.

   b. Select the required key staff details and click **Select**.

9. In the **Attachments** section, upload images and files relevant to the past project. For information on form attachments, refer *Attachments*.

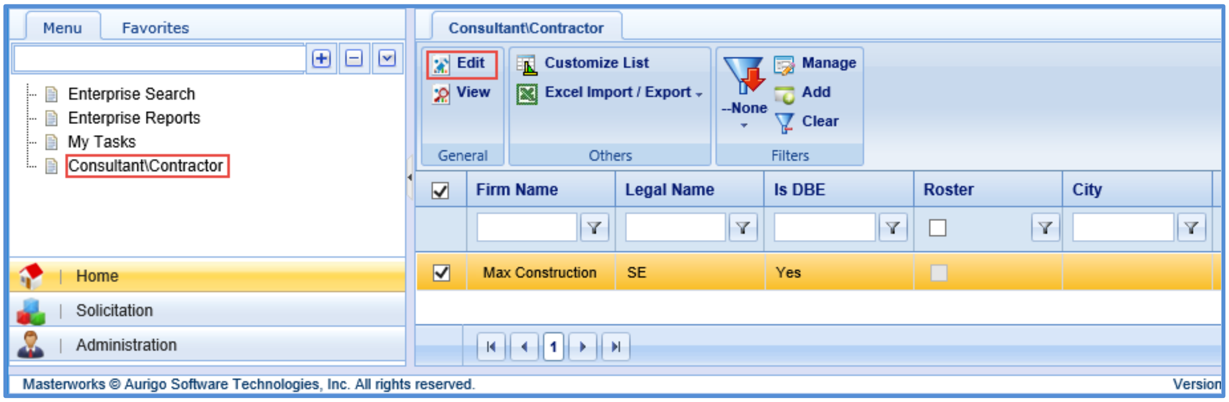
10. Click **Save.**

9 Snapshots

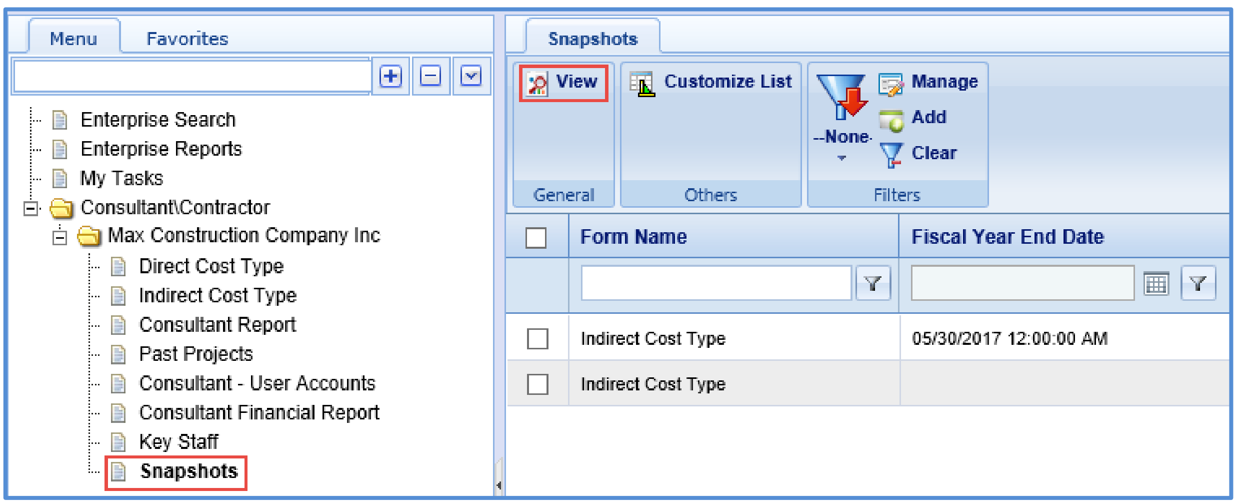
The system allows you to view the changes made in direct cost types and indirect cost types.

Steps:

1. In the module menu, click **Home**. The **Enterprise Dashboard** is displayed.
2. In the navigation pane, click **Consultant\Contractor**. The **Consultant\Contractor** page is displayed.
3. Select the Consultant\Contractor record and click **Edit**.



4. In the navigation pane, in the consultant\contractor record folder, click **Snapshots.** The **Snapshots** list page is displayed listing all the direct and indirect cost type record that have been changed.



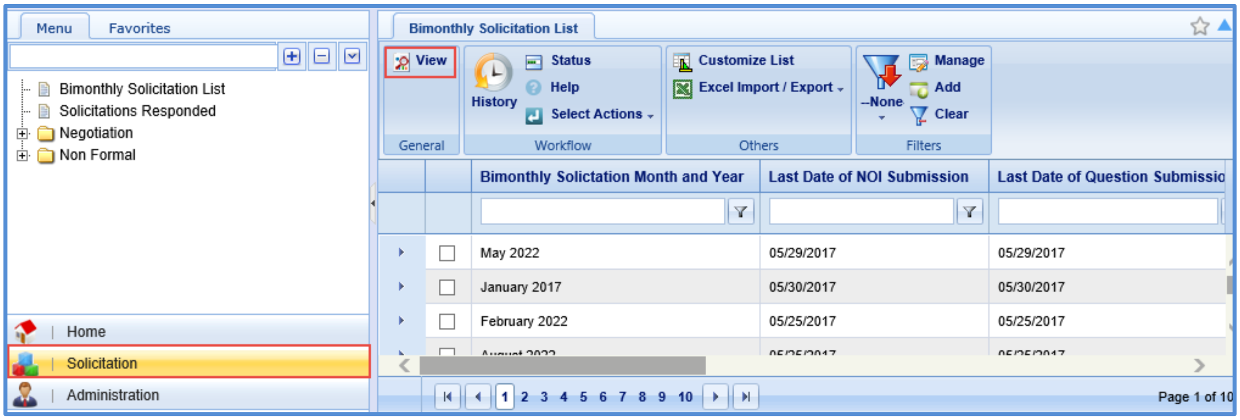
5. Select a record and then click **View**.

10 Viewing Bimonthly Solicitation

The system allows you to view the bimonthly solicitations published to the firm.

Steps:

1. In the module menu, click **Solicitation**. The **Bimonthly Solicitation List** page is displayed.



2. In the **General** group, click **View**. The **Bimonthly Solicitation Details** page is displayed.

Appendix

11 Attachments

11.1 Attaching a File to a Form

You can attach files to a form. You can also link a file in the document management folders to a form.

Steps:

- To upload files to a form, perform the following steps in the **Attachments** section:
  1. Click **Upload Document**. The **Choose File to Upload** dialog box is displayed.
  2. To upload a single file, click the required file.
     Alternatively, to upload multiple files, press CTRL, and then click the required files.
  3. Click **Open**.
     The files are uploaded to the form, and are displayed in the attachment grid.
  4. In the **Title** column, enter the titles for the files attached.
- To link files in the Masterworks **Documents** folders to a form, perform the following steps:
  1. In the **Attachments** section, click **Link Document**.
  2. From the **Folder** drop-down box, select the required folder where the files exist.
     The list of files in that folder are displayed.
  3. From the list of files, select the required files.
  4. Click **OK**.
     The files are linked to the form, and are displayed in the attachment grid.
  5. In the **Title** column, enter the titles for the linked files.

11.2 Accessing Attached Files

Files attached to a form can be accessed from the list page of the form.

Steps:

1. From the navigation tree, click the required form.
   The form list page is displayed.
2. In the tool bar, in the **Other** group, click **Attachments**.
   The attachments of all the forms are listed.