

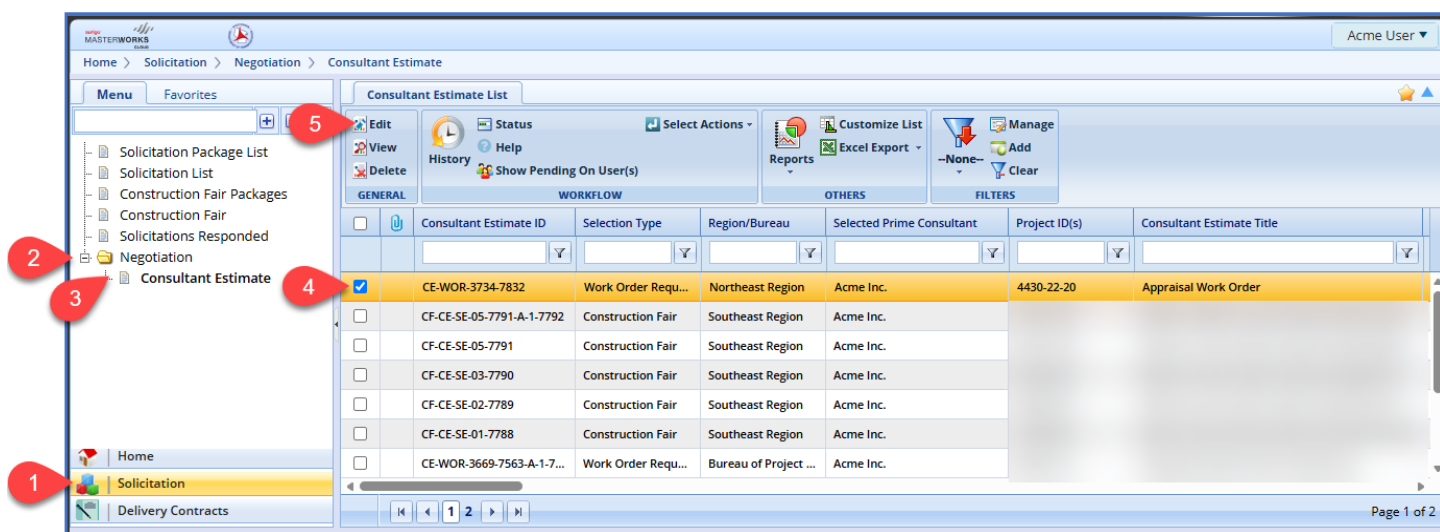
1. Consultant Estimate

1.1 Entering the Consultant Estimate

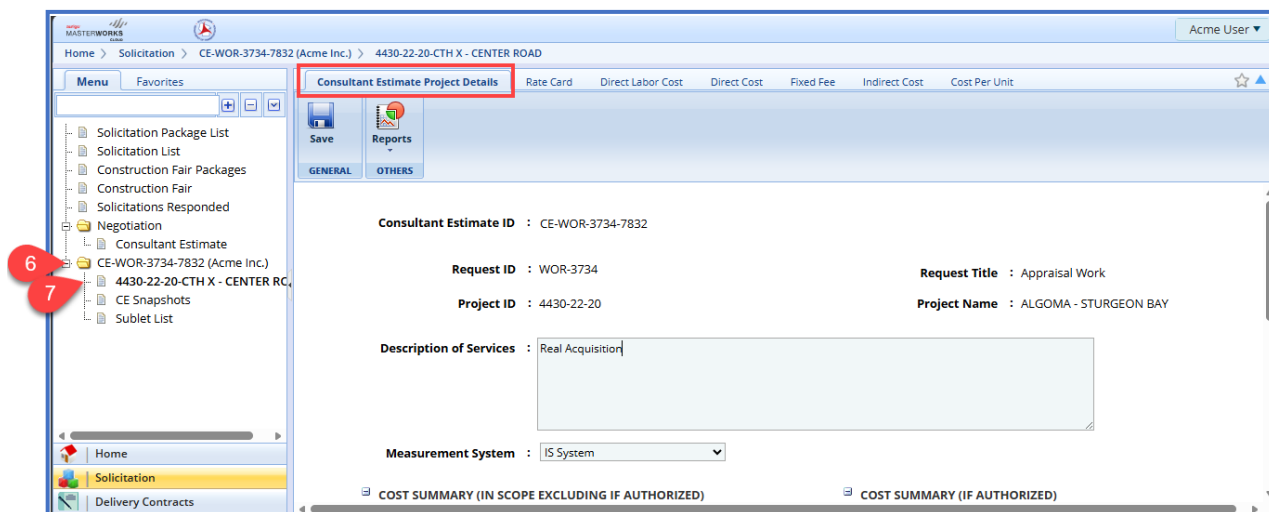
The procedure to add consultant estimate details are described.

NOTE: Only consultant estimates in “Scope Finalized” status are editable.

1. In the module menu, click **Solicitation**.
2. In the navigation pane, open the **Negotiation** folder by clicking the plus button and
3. Select **Consultant Estimate**.
4. Select a consultant estimate that is being entered
5. Click **Edit**. The **Consultant Estimate Details** page is displayed.



6. In the navigation pane, the **CE Estimate** folder will appear. If it is not already expanded, open the folder by clicking the plus button next to it.
7. Click the **Project ID**. The **Consultant Estimate Project Details** page will open.



Note: The values in the **Consultant Estimate ID**, **Request ID/Solicitation ID**, **Request Title/Solicitation Month and Year**, **Project ID**, and **Project Name** fields are auto populated.

Note: The **Cost Summary (In Scope Excluding If Authorized)** section auto populates the total of the Direct Labor Cost, Direct Cost, Fixed Fee, Indirect Cost, and Cost Per Unit based on the values entered in the respective tabs. This section excludes the values that are marked **If Authorized = Yes**. The sum of all costs is auto calculated and displayed in the **Estimate Total in \$** field.

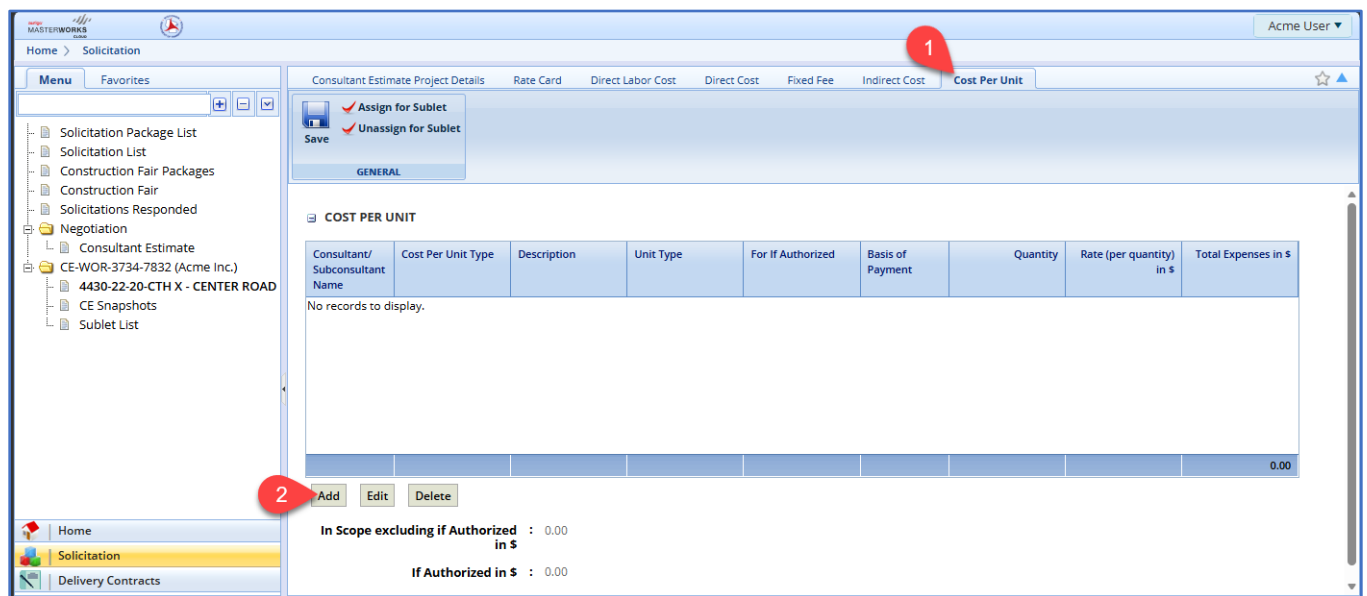
2. Cost Per Unit Instructions

2.1 Consultant Estimate Entry

Pre-requisite: Follow the instructions under 2.3 of the Consultant Manual, steps 1-5.

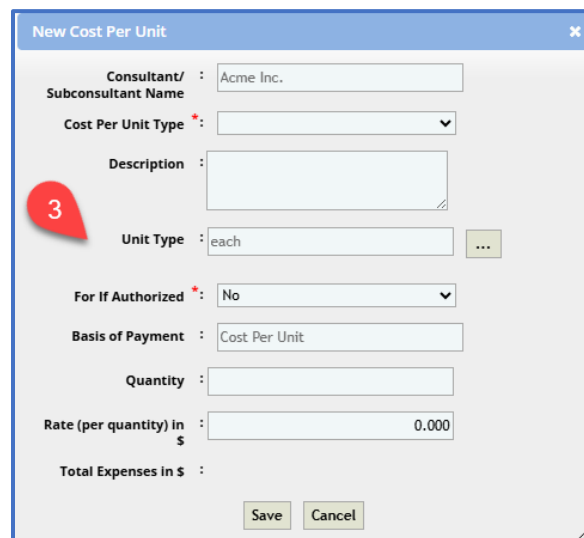
Steps:

1. Select the **Cost Per Unit** tab at the top of the screen. The **Cost Per Unit** page will now be displayed.
2. Select **Add** under the **Cost Per Unit** table.



The screenshot shows the MASTERWORKS software interface. The 'Cost Per Unit' tab is selected at the top. Below the tab, there is a table with the following columns: Consultant/Subconsultant Name, Cost Per Unit Type, Description, Unit Type, For If Authorized, Basis of Payment, Quantity, Rate (per quantity) in \$, and Total Expenses in \$. The table is currently empty, with a message 'No records to display.' below it. At the bottom of the table, there are buttons for 'Add', 'Edit', and 'Delete'. A red circle with the number 2 points to the 'Add' button. Below the table, there are two summary fields: 'In Scope excluding if Authorized in \$' and 'If Authorized in \$', both showing '0.00'.

3. The **New Cost Per Unit** dialog box will be displayed.



The screenshot shows the 'New Cost Per Unit' dialog box. It contains the following fields and controls:

- Consultant/Subconsultant Name:** Acme Inc.
- Cost Per Unit Type:** (Dropdown menu)
- Description:** (Text input field)
- Unit Type:** each (with a dropdown arrow)
- For If Authorized:** No (with a dropdown arrow)
- Basis of Payment:** Cost Per Unit
- Quantity:** (Text input field)
- Rate (per quantity) in \$:** 0.000
- Total Expenses in \$:** (Text input field)
- Buttons:** Save, Cancel

A red circle with the number 3 points to the 'Description' field.

4. Fill in all required fields that have not been auto populated. Required fields have a red asterisk. Complete all optional fields as needed. See the following table for explanation of fields and actions that aren't auto populated.
5. Click **Save**.

Cost Per Unit Fields

- **Consultant/Subconsultant Name**
 - **Requirement:** Auto-populated
 - **Description:** This field is auto populated with the firm's doing business as name.
- **Cost Per Unit Type**
 - **Requirement:** Mandatory
 - **Description:** From the drop-down list, select the best fitting cost per unit type. If the unit type needed is not listed, contact the Masterworks help desk to have it added.
- **Description**
 - **Requirement:** Non-mandatory but strongly recommended.
 - **Description:** Enter any further details about the cost per unit item.
- **Unit Type**
 - **Requirement:** Mandatory
 - **Description:** The Unit Type drop-down defaults to an associated type based on the Cost Per Unit Type selected. To change this field, select the ellipses next to the field. The Unit Type dialog box will display. From the list provided, select the most accurate unit. Once the line item is selected, click **Select**.
- **Quantity**
 - **Requirement:** Non-mandatory
 - **Description:** Enter the estimated number of units.
- **Rate (per quantity) in \$**
 - **Requirement:** Non-mandatory
 - **Description:** Enter the rate in dollars for each unit. Units with different rates must be added separately as their own item.
- **Total Expenses in \$**
 - **Requirement:** Auto-populated
 - **Description:** This field is automatically calculated once the Rate (per quantity) in \$ has been entered. It equals the full dollar amount for the cost per unit item.

The screenshot shows the 'New Cost Per Unit' dialog box. A red box highlights the following fields: 'Cost Per Unit Type' (set to 'Parcel'), 'Description' (set to 'Nominal Appraisal - Short Form'), 'Unit Type' (set to 'each'), 'For If Authorized' (set to 'No'), 'Basis of Payment' (set to 'Cost Per Unit'), 'Quantity' (set to '3.00'), and 'Rate (per quantity) in \$' (set to '1,800.000'). A red callout with the number '4' points to the 'Unit Type' field. A red callout with the number '5' points to the 'Save' button at the bottom. The 'Total Expenses in \$' field at the bottom shows '5,400.00'.

Field	Value
Consultant/Subconsultant Name	Acme Inc.
Cost Per Unit Type *	Parcel
Description	Nominal Appraisal - Short Form
Unit Type	each
For If Authorized *	No
Basis of Payment	Cost Per Unit
Quantity	3.00
Rate (per quantity) in \$	1,800.000
Total Expenses in \$	5,400.00

6. Once all line items have been entered, confirm the total Cost Per Unit amount at the bottom of the screen.

Home > Solicitation

Menu Favorites

Solicitation Package List
Solicitation List
Construction Fair Packages
Construction Fair
Solicitations Responded
Negotiation
Consultant Estimate
CE-WOR-3734-7832 (Acme Inc.)
4430-22-20-CTH X - CENTER ROAD
CE Snapshots
Sublet List

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

Assign for Sublet
Unassign for Sublet
Save

GENERAL

COST PER UNIT

Consultant/ Subconsultant Name	Cost Per Unit Type	Description	Unit Type	For If Authorized	Basis of Payment	Quantity	Rate (per quantity) in \$	Total Expenses in \$
Acme Inc.	Parcel	Nominal Appraisal - Short Form	each	No	Cost Per Unit	3.00	1,800.000	5,400.00
Acme Inc.	Parcel	Major Improved - Detailed B&A	each	No	Cost Per Unit	2.00	3,500.000	7,000.00
								12,400.00

Add Edit Delete

In Scope excluding If Authorized in \$: 12,400.00
If Authorized in \$: 0.00

7. Click **Save**

2.2 Cost Per Unit Excel Import

1. Navigate to the **Consultant Estimate Details** page, click **Import Cost Per Unit Item(s)**.

Home > Solicitation > Negotiation > Consultant Estimate

Menu Favorites

Solicitation Package List
Solicitation List
Construction Fair Packages
Construction Fair
Solicitations Responded
Negotiation
Consultant Estimate
CE-WOR-3734-7832 (Acme Inc.)

Consultant Estimate List

Edit View Delete
History Help
Show Pending On User(s)

GENERAL WORKFLOW OTHERS

Consultant Estimate ID	Selection Type	Region/Bureau	Selected Prime Consultant	Project ID(s)	Consultant Estimate Title
☒ CE-WOR-3734-7832	Work Order Requ...	Northeast Region	Acme Inc.	4430-22-20	Appraisal Work Order
☐ CF-CE-SE-05-7791-A-1-7792	Construction Fair	Southeast Region	Acme Inc.		
☐ CF-CE-SE-05-7791	Construction Fair	Southeast Region	Acme Inc.		
☐ CF-CE-SE-03-7790	Construction Fair	Southeast Region	Acme Inc.		
☐ CF-CE-SE-02-7789	Construction Fair	Southeast Region	Acme Inc.		
☐ CF-CE-SE-01-7788	Construction Fair	Southeast Region	Acme Inc.		
☐ CE-WOR-3669-7563-A-1-7...	Work Order Requ...	Bureau of Project ...	Acme Inc.		

Home Solicitation Delivery Contracts

Page 1 of 2

Home > Solicitation > Negotiation > Consultant Estimate

Menu Favorites

Solicitation Package List
Solicitation List
Construction Fair Packages
Construction Fair
Solicitations Responded
Negotiation
Consultant Estimate
CE-WOR-3734-7832 (Acme Inc.)

Consultant Estimate Details

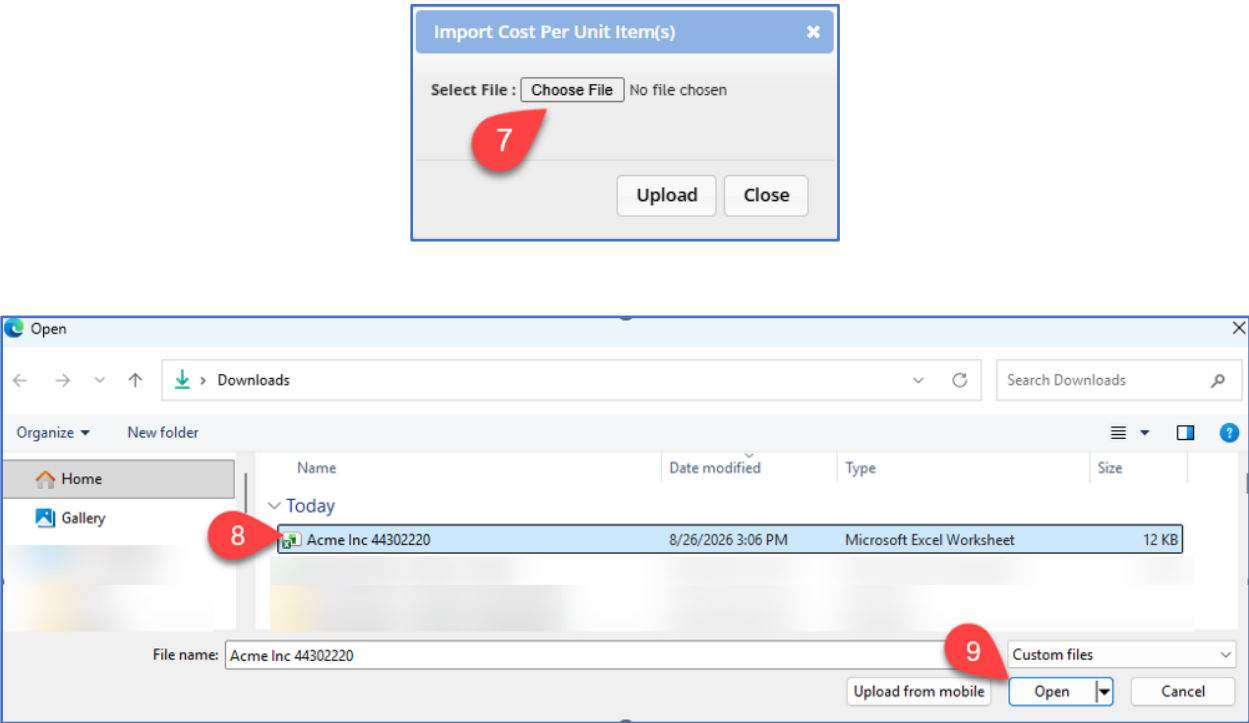
Save Cancel History ReDraft
Import Cost Per Unit Item(s)

GENERAL WORKFLOW OTHERS

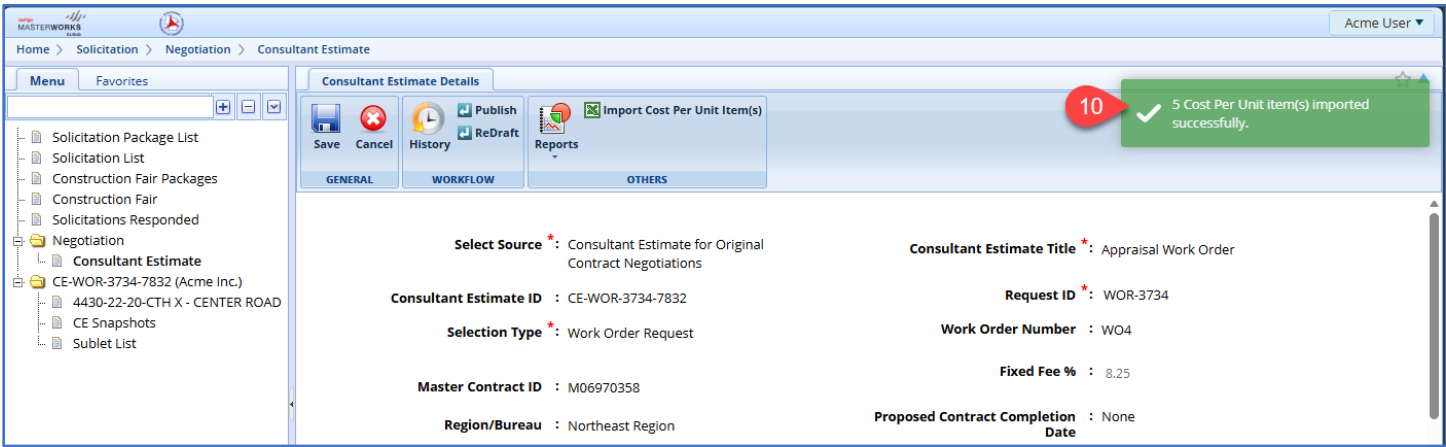
Select Source *: Consultant Estimate for Original Contract Negotiations
Consultant Estimate ID : CE-WOR-3734-7832
Selection Type *: Work Order Request
Master Contract ID : M06970358

Consultant Estimate Title *: Appraisal Work Order
Request ID *: WOR-3734
Work Order Number : WO4
Fixed Fee % : 8.25

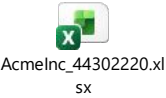
2. Click **Choose File**.



If successful, a green confirmation message will be displayed.



Note: A template of common Cost Per Unit items follows:



2.3 Adding a Sub Consultant Estimate

Pre-requisite: Complete steps 1.1 of this document.

Steps:

1. From the Cost Per Unit page, select the **Assign for Sublet** button at the top of the screen.

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

☒ Assign for Sublet
☒ Unassign for Sublet

Save

GENERAL

COST PER UNIT

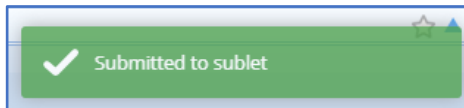
Consultant/ Subconsultant Name	Cost Per Unit Type	Description	Unit Type	For If Authorized	Basis of Payment	Quantity	Rate (per quantity) in \$	Total Expenses in \$
								14,500.00

Add Edit Delete

In Scope excluding if Authorized : 14,500.00
in \$

If Authorized in \$: 0.00

A green confirmation message should appear.



2. Complete section 9 of the manual.

2.4 Amendments

Pre-requisite: Follow the instructions under section 12 of the manual.

1. From the **Consultant Estimate Project Details** page, select the Cost Per Unit tab.

IN-INTERSTATE

WisDOT Negotiation Project Estimate Details Direct Labor Cost Direct Cost Fixed Fee Indirect Cost **Cost Per Unit**

2. Complete steps 1-5 under section 1.1 of this document.
3. Return to the **Consultant Estimate List** page. Find the amendment estimate in the list and select it. From the drop-down in the top header, select **Publish**. WisDOT will now review the estimate.

MASTERWORKS

Home > Solicitation > Negotiation > Consultant Estimate

Menu Favorites

- Solicitation Package List
- Solicitation List
- Construction Fair Packages
- Construction Fair
- Solicitations Responded
- Negotiation
 - Consultant Estimate

Home

Solicitation

Delivery Contracts

Consultant Estimate List

GENERAL

WORKFLOW

OTHERS

FILTERS

1

2

Select Actions

Publish

ReDraft

Publish

Customize List

Excel Export

Manage

Add

Clear

	Consultant Estimate ID	Selection Type	Region/Bureau	Selected Prime Consultant	Project ID(s)
☐					
☐	10-00-100-1000	Small Purchase	Bureau of Project ...	10000-00-00	10000-00-00
☒	10-00-00-0000-0000	Solicitation	Southeast Region	10000-00-00	10000-00-00

1 2 3 4 5 6 7 8