

Contract Negotiation in Masterworks

Fall 2019

Specific Rate of Compensation Basis of Payment



Wisconsin Department of Transportation

Version 1.0

Table of Contents

Table of Contents.....	i
Version Notes.....	iii
1 General Masterworks Information	A
1.1 Consultant/WisDOT	A
1.1.1 Create and Save a filter (Consultant Estimate example)	A
1.1.2 Save a favorite (Consultant Estimate example)	C
1.1.3 Add a new task.....	E
1.2 Consultant	J
1.2.1 Add key staff	J
2 Consultant Estimate – WisDOT	K
2.1 Start a Negotiation	K
2.2 Bimonthly Solicitation	L
2.3 Construction Fair.....	M
2.4 Add Tasks to the Scope	M
2.5 Send the Negotiation to the Consultant	O
3 Consultant Estimate – Consultant.....	R
3.1 Finding the Negotiation	S
3.1.1 Prime Consultant.....	S
3.1.2 Subconsultant	W
3.2 Create a Rate Card	Y
3.2.1 Create a new rate card.....	Y
3.2.2 Add Specific Rate Escalation Details	CC
3.2.3 Weight Employee Contributions.....	GG
3.2.4 Import a Rate Card.....	II
3.2.5 Premium Pay with Indirect Cost Applied	JJ
3.2.6 Premium Pay without Indirect Cost Applied.....	KK
3.2.7 Complete the Rate Card.....	LL
3.3 Direct Labor Cost.....	NN
3.3.1 Entering Direct Labor	NN
3.3.2 Creating a Sublet.....	RR

3.3.3	Completing Direct Labor Cost	WW
3.4	Add Direct Costs	XX
3.5	Fixed Fee	ZZ
3.6	Indirect Cost	AAA
3.7	Publishing the Estimate.....	AAA
3.7.1	Accepting Subconsultant Negotiations.....	AAA
3.7.2	Publishing the Prime’s Estimate.....	BBB
3.7.3	Publishing a Sublet.....	CCC
4	Review Estimate – WisDOT	EEE
4.1	Negotiation Reports	EEE
4.2	Reviewing Estimate Costs	EEE
4.3	Returning the Negotiation for Revision	GGG
5	Revising the Estimate – Consultant.....	III
6	Complete Negotiation – WisDOT	KKK
7	Create a Contract – WisDOT	MMM
8	Review Contract – Consultant.....	QQQ
9	Submit Contract for Approval - WisDOT	TTT

Version Notes

Version 1.0

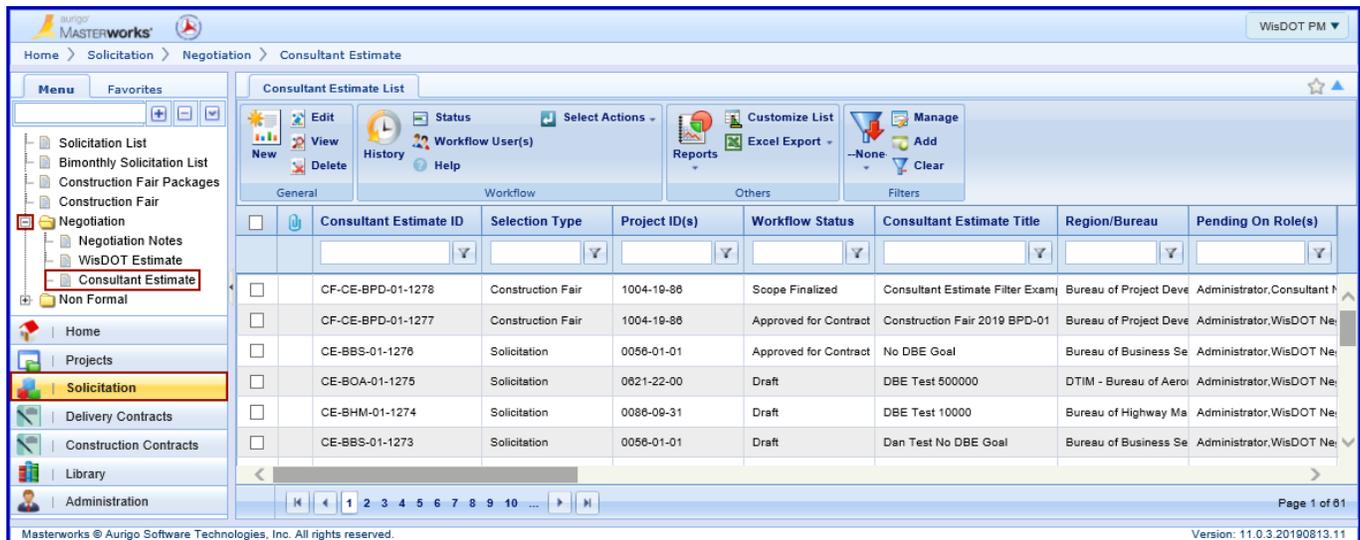
- None

1 General Masterworks Information

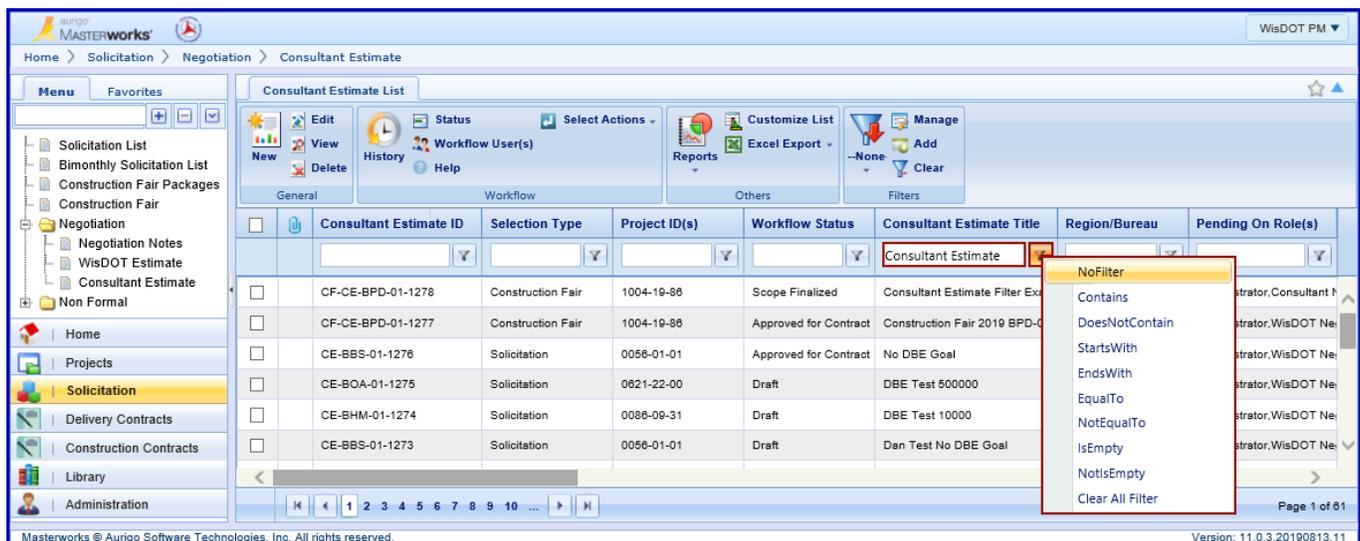
1.1 Consultant/WisDOT

1.1.1 Create and Save a filter (Consultant Estimate example)

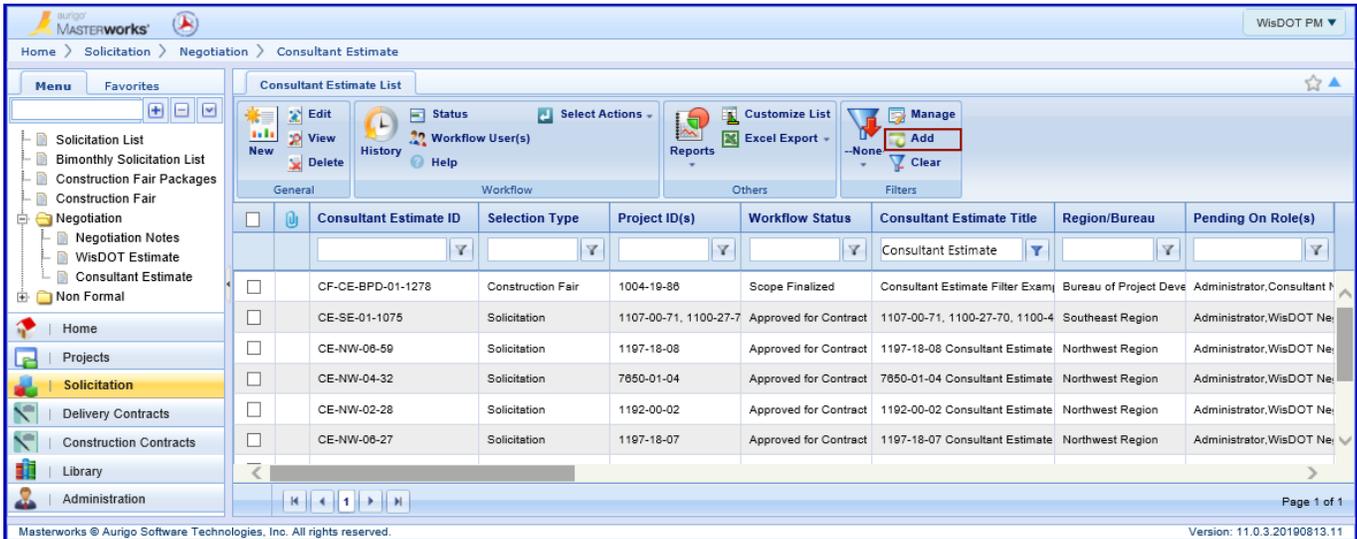
Navigate to the **Solicitation** module, expand the **Negotiation** folder in the left navigation and click the **Consultant Estimate** link.



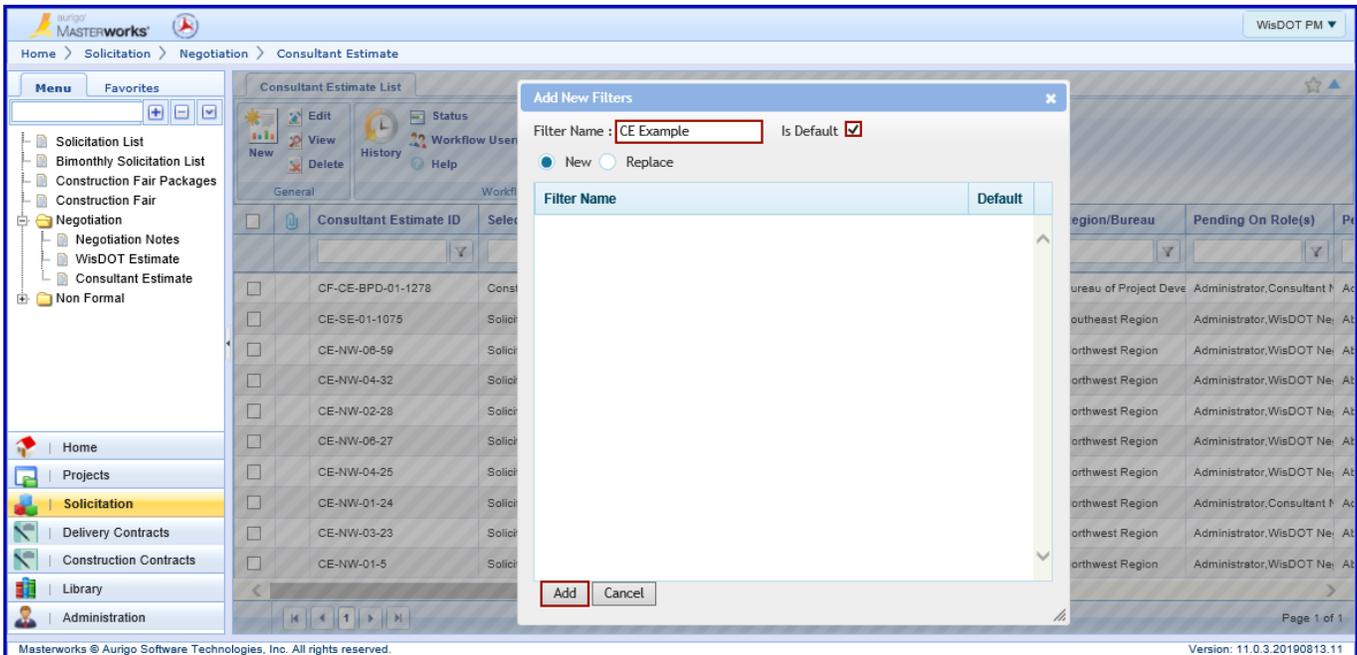
Type the filter criteria in the **Consultant Estimate Title** column. Press enter to use the default Contains filter option. Other filter options are available.



The filtered list is now displayed. To save the filter click the **Add** button in the filters group on the ribbon.



Type **Filter Name**. Checking the box for **Is Default** will cause the filter to be automatically applied every time the page is viewed. Click **Add**.



A message will display indicating the filter has been saved.

The screenshot shows the Masterworks interface with a green message box in the top right corner that reads: "Filter Manager 'CE Example' has been saved." The main window displays a "Consultant Estimate List" table with columns for Consultant Estimate ID, Selection Type, Project ID(s), Workflow Status, Consultant Estimate Title, Region/Bureau, and Pending On Role(s). The table contains several rows of data, including entries for Construction Fair and Solicitation types.

Consultant Estimate ID	Selection Type	Project ID(s)	Workflow Status	Consultant Estimate Title	Region/Bureau	Pending On Role(s)
CF-CE-BPD-01-1278	Construction Fair	1004-19-86	Scope Finalized	Consultant Estimate Filter Exam	Bureau of Project Deve	Administrator, Consultant
CE-SE-01-1075	Solicitation	1107-00-71, 1100-27-7	Approved for Contract	1107-00-71, 1100-27-70, 1100-4	Southeast Region	Administrator, WisDOT Ne
CE-NW-06-59	Solicitation	1197-18-08	Approved for Contract	1197-18-08 Consultant Estimate	Northwest Region	Administrator, WisDOT Ne
CE-NW-04-32	Solicitation	7650-01-04	Approved for Contract	7650-01-04 Consultant Estimate	Northwest Region	Administrator, WisDOT Ne
CE-NW-02-28	Solicitation	1192-00-02	Approved for Contract	1192-00-02 Consultant Estimate	Northwest Region	Administrator, WisDOT Ne
CE-NW-06-27	Solicitation	1197-18-07	Approved for Contract	1197-18-07 Consultant Estimate	Northwest Region	Administrator, WisDOT Ne

1.1.2 Save a favorite (Consultant Estimate example)

To save any location as a favorite, click on the star icon on the upper right of the page.

The screenshot shows the Masterworks interface with a star icon in the top right corner, indicating a favorite location. The main window displays the same "Consultant Estimate List" table as in the previous screenshot. The star icon is located in the top right corner of the main content area.

Type a **Title** for the favorite and click **Add**.

The screenshot shows the Masterworks interface with the 'Consultant Estimate List' table. A dialog box is open for adding a favorite. The dialog has a star icon, a title field containing 'Consultant Estimate List', a folder dropdown set to 'Unsorted', and an unchecked checkbox for 'New Folder'. 'Add' and 'Cancel' buttons are at the bottom.

Consultant Estimate ID	Selection Type	Project ID(s)	Workflow Status	Consultant Estim
CF-CE-BPD-01-1278	Construction Fair	1004-19-86	Scope Finalized	Consultant Estim
CE-SE-01-1075	Solicitation	1107-00-71, 1100-27-7	Approved for Contract	1107-00-71, 1100-27-70, 1100-4
CE-NW-06-59	Solicitation	1197-18-08	Approved for Contract	1197-18-08 Consultant Estimate
CE-NW-04-32	Solicitation	7850-01-04	Approved for Contract	7850-01-04 Consultant Estimate
CE-NW-02-28	Solicitation	1192-00-02	Approved for Contract	1192-00-02 Consultant Estimate
CE-NW-06-27	Solicitation	1197-18-07	Approved for Contract	1197-18-07 Consultant Estimate

The favorite may now be found in the **Favorites** navigation.

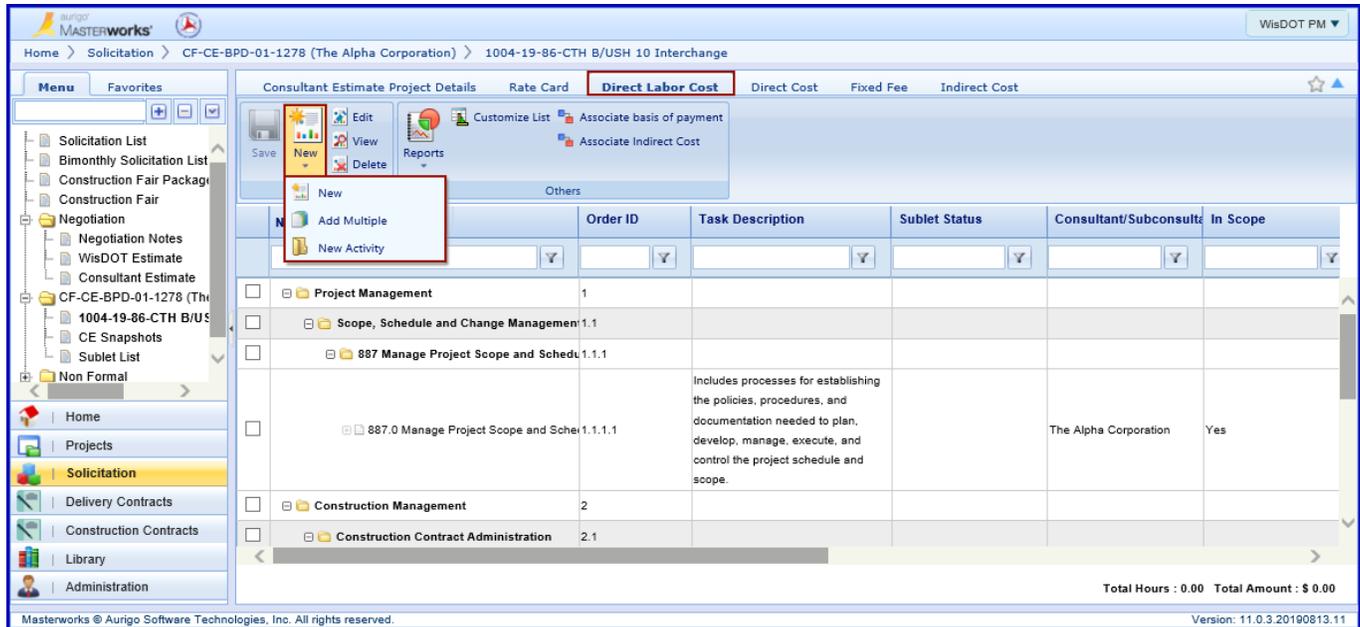
The screenshot shows the Masterworks interface with the 'Favorites' navigation pane on the left, where 'Consultant Estimate List' is highlighted. The main area displays a report titled 'March 2019 NOI Responses' with a horizontal bar chart. The chart shows the number of responses for various solicitation IDs in March 2019.

Solicitation ID	Number of Responses
BPED-01	6
BOS-01	4
BOS-02	8
NW-01	20
NW-02	18
SE-01	12
SW-01	25
SW-02	26
SW-03	25

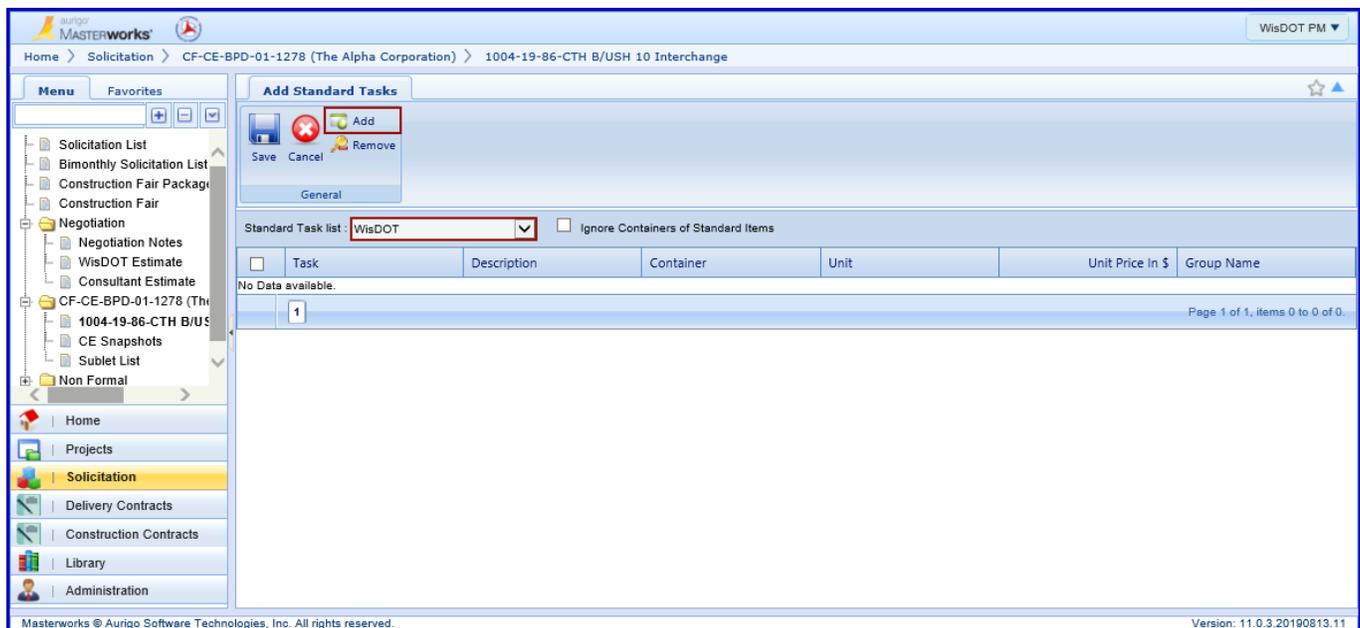
1.1.3 Add a new task

1.1.3.1 Add a new task from the library

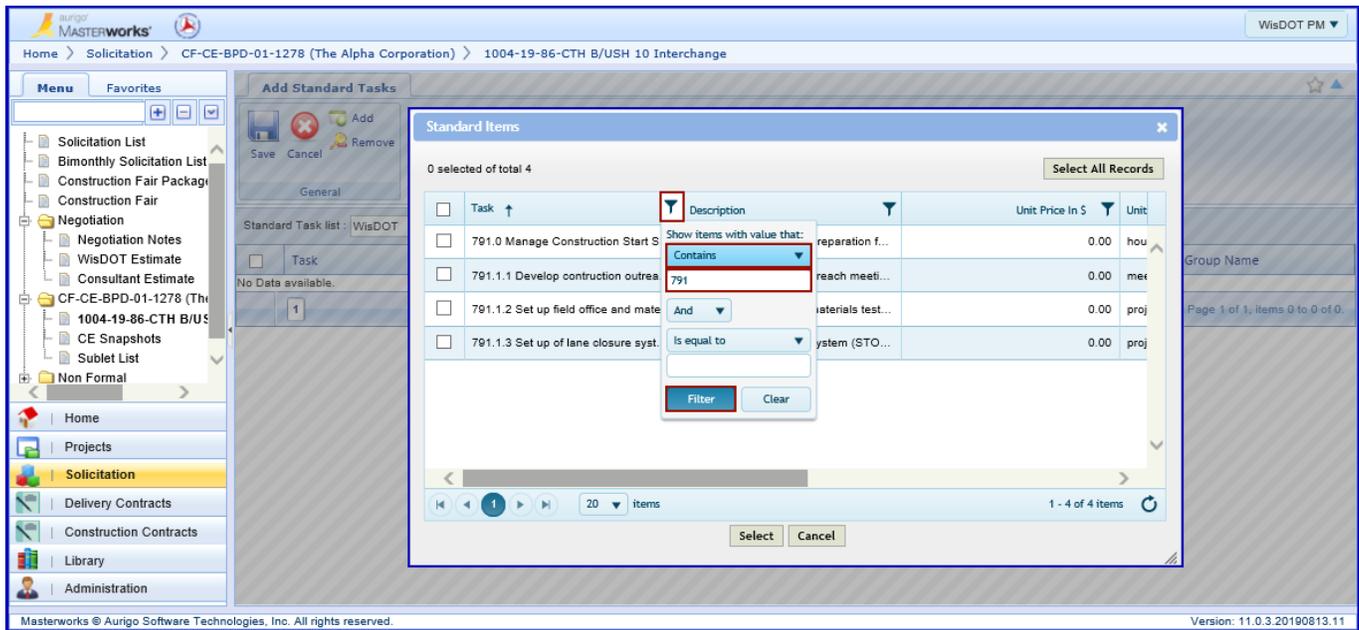
To add a new task from the task library, start on the **Direct Labor Cost** tab of the Consultant Estimate. In the ribbon, click **New** and then click **Add Multiple**.



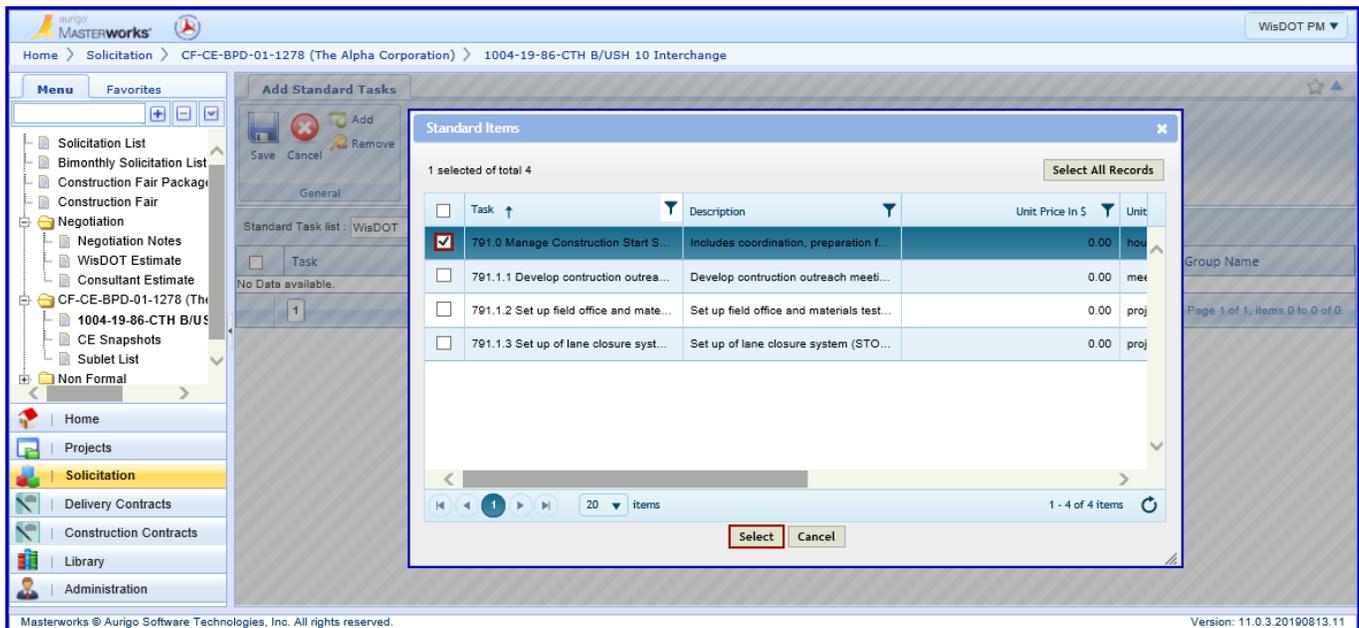
Select WisDOT from the dropdown list next to Standard Task list and click **Add**.



Use the filter to search for the task to be added.



Check the box next to the task(s) to be added and click **Select**. Note: multiple tasks may be selected and added at the same time.



Click **Save** to add the task to the task list.

The screenshot shows the 'Add Standard Tasks' dialog box in the Masterworks application. The 'Save' button is highlighted with a red box. The background shows a navigation menu on the left and a task list table with one item: '791.0 Manage Construction Sta'.

Task	Description	Container	Unit	Unit Price In \$	Group Name
791.0	Manage Construction Sta	Includes coordination, preparati	791 Manage Construction Start	hours	0.00

The task has now been added to the task list.

The screenshot shows the 'Direct Labor Cost' tab in the Masterworks application. The task list table now contains four items, with the '791.0 Manage Construction Start' task highlighted with a red box. The 'Total Hours' and 'Total Amount' are shown as 0.00.

Name	Order ID	Task Description	Sublet Status	Consultant/Subconsultant	In Scope
852 Evaluate Construction Material	2.1.3				
852.0 Evaluate Construction Material S	2.1.3.1	Tasks involved with the evaluation of construction materials, including quality control, material records, plant review, etc.		The Alpha Corporation	Yes
Post-Let Pre-Construction Project Manage	2.2				
791 Manage Construction Start	2.2.1				
791.0 Manage Construction Start S	2.2.1.1	Includes coordination, preparation for meetings and reviews (pre-construction, utility, public and business meetings, workshops, erosion control implementation plan)		The Alpha Corporation	Yes

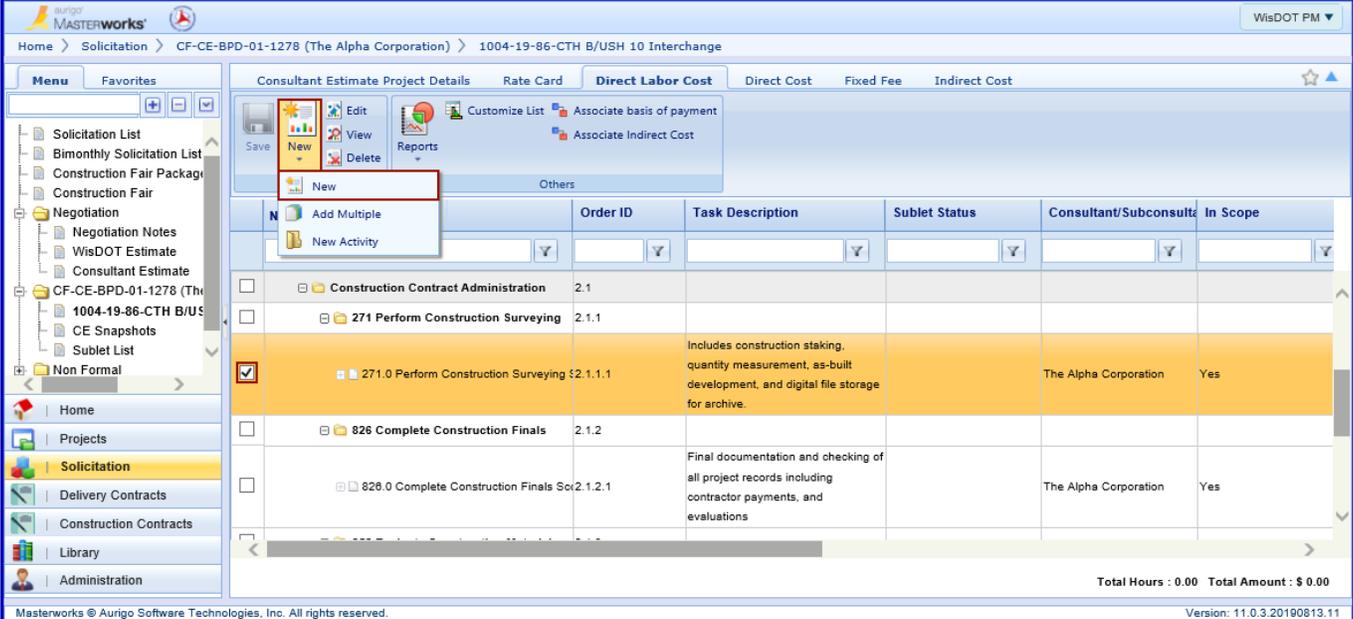
Total Hours : 0.00 Total Amount : \$ 0.00

1.1.3.2 Create a new task

In some cases, a new task that does not exist in WisDOT's library needs to be created. Standard tasks should be used whenever possible. An example of when a new task needs to be created is when entering in a cost per unit.

Please coordinate with WisDOT before creating a new task.

Select the task that will become the parent task, click **New** in the ribbon and click **New** in the dropdown.



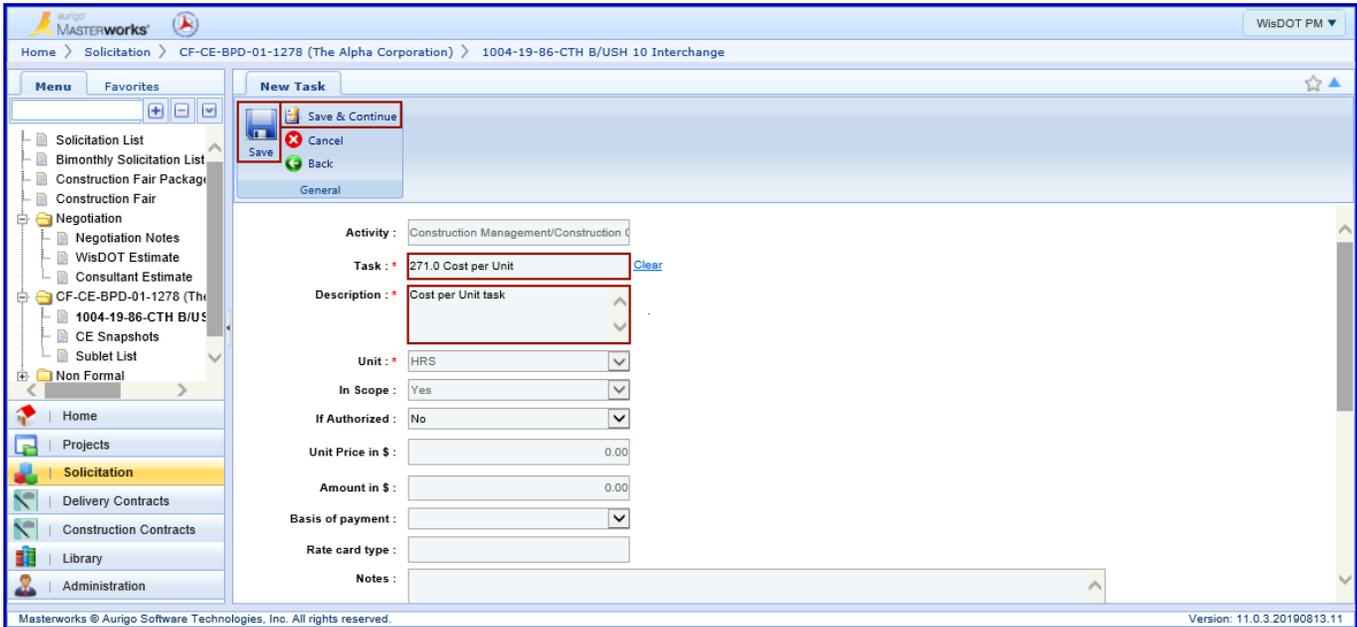
The screenshot shows the Masterworks software interface. The top navigation bar includes 'Home', 'Solicitation', 'CF-CE-BPD-01-1278 (The Alpha Corporation)', and '1004-19-86-CTH B/USH 10 Interchange'. The main window is divided into several tabs: 'Consultant Estimate', 'Project Details', 'Rate Card', 'Direct Labor Cost', 'Direct Cost', 'Fixed Fee', and 'Indirect Cost'. The 'Direct Labor Cost' tab is active, showing a table with columns: 'Order ID', 'Task Description', 'Sublet Status', 'Consultant/Subconsultant', and 'In Scope'. The table contains several rows, with the row '271.0 Perform Construction Surveying' (Order ID 2.1.1.1) selected. A ribbon at the top of the table area contains buttons for 'Save', 'New', 'Edit', 'View', 'Delete', 'Reports', 'Customize List', 'Associate basis of payment', and 'Associate Indirect Cost'. The 'New' button is highlighted, and a dropdown menu is open, showing 'New' as the selected option. The bottom status bar displays 'Total Hours : 0.00 Total Amount : \$ 0.00'.

Order ID	Task Description	Sublet Status	Consultant/Subconsultant	In Scope
2.1	Construction Contract Administration			
2.1.1	271 Perform Construction Surveying			
2.1.1.1	271.0 Perform Construction Surveying		The Alpha Corporation	Yes
2.1.2	826 Complete Construction Finals			
2.1.2.1	826.0 Complete Construction Finals		The Alpha Corporation	Yes

Click **OK** on the warning message that appears.

Any resource or cost information that has been added to that task will be deleted.

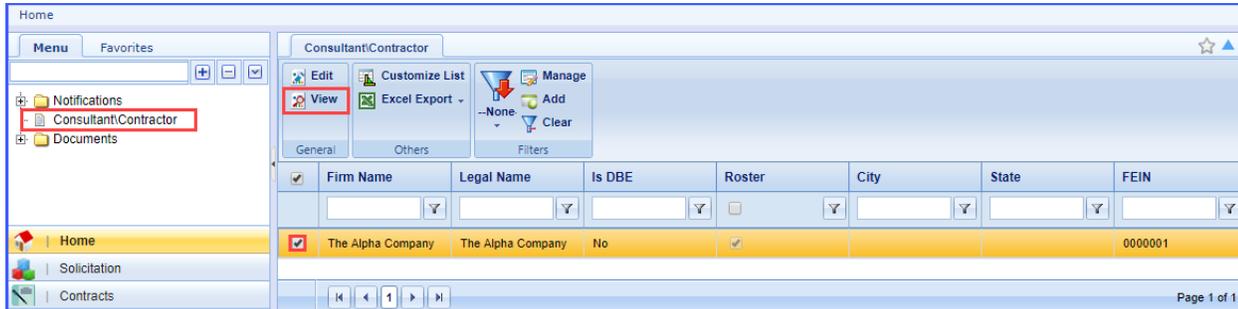
Enter the new task name in the Task field. This should contain the activity code of the parent task. Enter a short description of the task and click **Save**. If more than one new task will be added to the activity, click **Save & Continue** to create another new task.



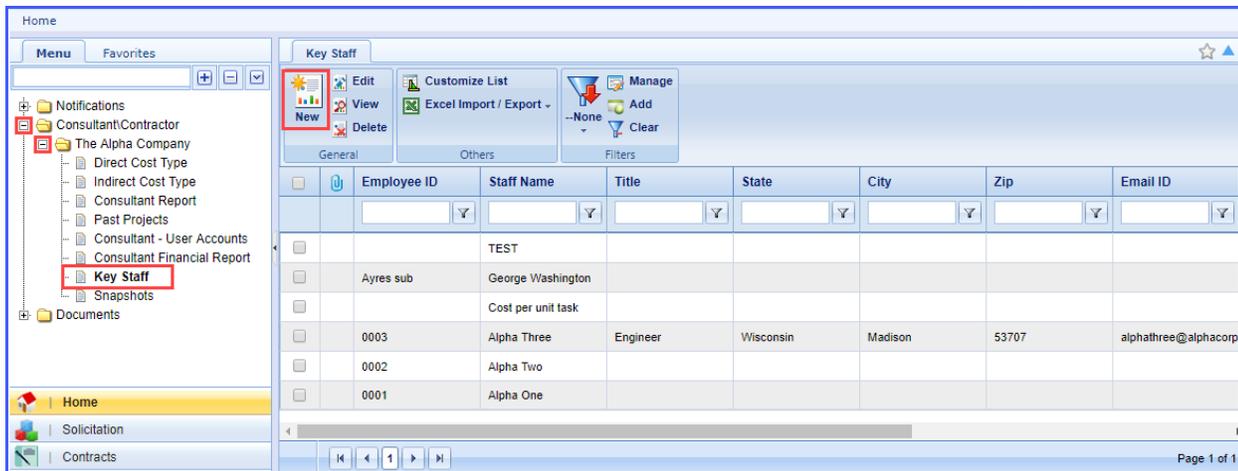
1.2 Consultant

1.2.1 Add key staff

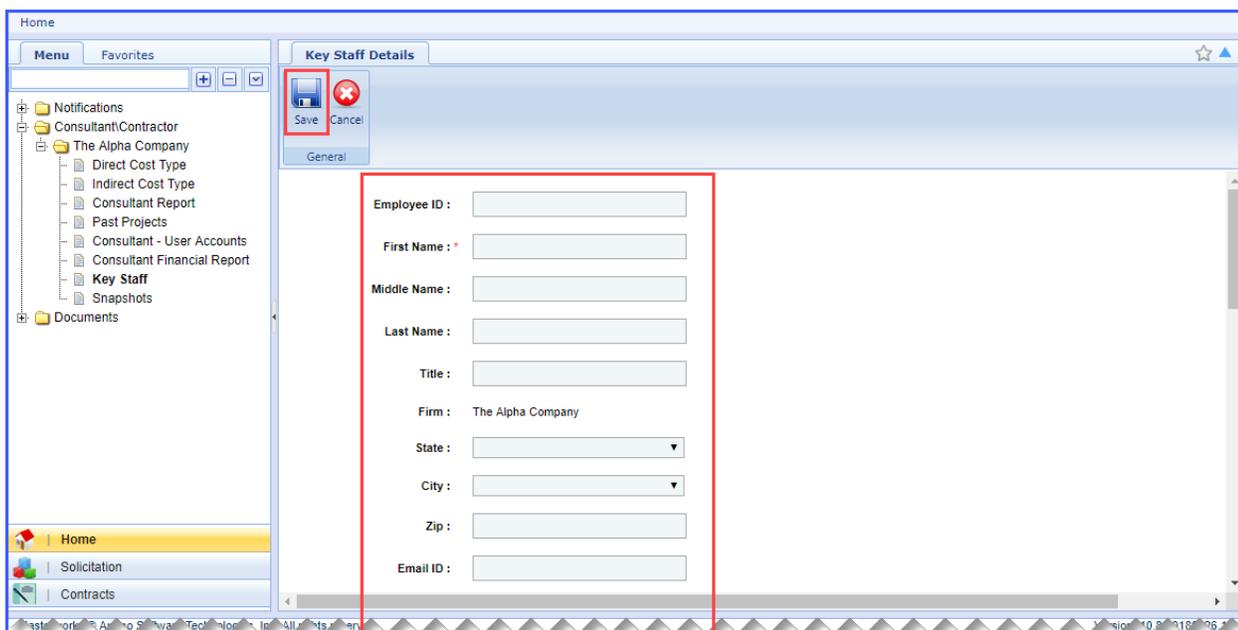
Click the **Consultant\Contractor** link, check the box next to the firm in the middle of the page and click **View**.



Expand the folders for Consultant\Contractor and the consultant firm. Click on the **Key Staff** link and click **New**.



Fill out the employee information and click **Save**.



2 Consultant Estimate – WisDOT

2.1 Start a Negotiation

Navigate to the **Solicitation** module, expanding the **Negotiation** folder in the left navigation and clicking **Consultant Estimate**. Click **New**.

The screenshot shows the Masterworks software interface for the Consultant Estimate List. The left navigation pane is expanded to 'Solicitation', and the 'Consultant Estimate' option is highlighted. The main window displays a table of consultant estimates. The 'New' button in the top-left toolbar is highlighted with a red box. The table has the following columns: Consultant Estimate ID, Selection Type, Project ID(s), Workflow Status, Consultant Estimate Title, Region/Bureau, and Pending On Role(s). The table contains several rows of data, including entries for CE-BBS-01-1276, CE-BOA-01-1275, CE-BHM-01-1274, CE-BBS-01-1273, CE-BBS-01-1272, CE-BBS-01-1271, and CE-NC-02-1270.

Pick the **Selection Type** from the dropdown menu. This will change the autofill fields.

The screenshot shows the Masterworks software interface for the Consultant Estimate Details. The left navigation pane is expanded to 'Solicitation', and the 'Consultant Estimate' option is highlighted. The main window displays the details form for a consultant estimate. The 'Selection Type' dropdown menu is highlighted with a red box. The form has the following fields: Consultant Estimate ID (Auto Generated), Consultant Estimate Title, Selection Type, Fixed Fee % (0.00), Selected Prime Consultant, Import Task List from, Contract Function, and Total Estimate Amount in \$ (0.00).

If beginning a negotiation for a bimonthly solicitation package proceed to section 2.2 *Bimonthly Solicitation*.

If beginning a negotiation for a construction fair package proceed to section 2.3 *Construction Fair*.

2.2 Bimonthly Solicitation

Add a **Consultant Estimate Title**. Use the ellipses to select the **Bimonthly Solicitation Title**, which is the month and year of the solicitation. Use the ellipses to select the **Solicitation ID**, this is also known as the package ID. Use the ellipses to select the **Selected Prime Consultant**; this should be the number one ranked consultant from the shortlist, unless permission has been given to go to the next ranked consultant. Select Solicitation Task List from the dropdown in the **Import Task List from** field. Choose a **Negotiation Submission Due Date**; this is a date for a check in.

Consultant Estimate Details

Consultant Estimate ID : <Auto Generated>
Selection Type : Solicitation
Bimonthly Solicitation Month/Year : March 2015
Region/Bureau : Southwest Region
Selected Prime Consultant : The Della Company
Import Task List from : Solicitation Task List

Consultant Estimate Title : March 2015 SW-01
Bimonthly Solicitation Title : March 2015
Contract Function : Design Services
Solicitation ID : SW-01
Fixed Fee % : 7.50
Negotiation Submission Due Date : 10/31/2018

Projects (In scope excluding If authorized)

Project Name	Direct Labor	Direct Cost	Indirect Cost	Fixed Fee	Marked as	Total Hours	Total in \$	limit
ILLINOIS S	0.00	0.00	0.00	0.00		0.00	0.00	CTH N INTE

2.3 Construction Fair

Add a **Consultant Estimate Title**. Use the ellipses to select the **Construction Fair Title**, which is the year of the solicitation. Use the ellipses to select the **Construction Fair Package ID**. If the project leader (consultant/WisDOT) has changed, update the **Fixed Fee %**. Use the ellipses to select the **Selected Prime Consultant**; this should be the number one ranked consultant from the shortlist, unless permission has been given to go to the next ranked consultant. Select Construction Fair Package from the dropdown in the **Import Task List from** field. Choose a **Negotiation Submission Due Date**; this is a date for a check in. Use the ellipses to add a contract function; in most cases this will be Construction Services.

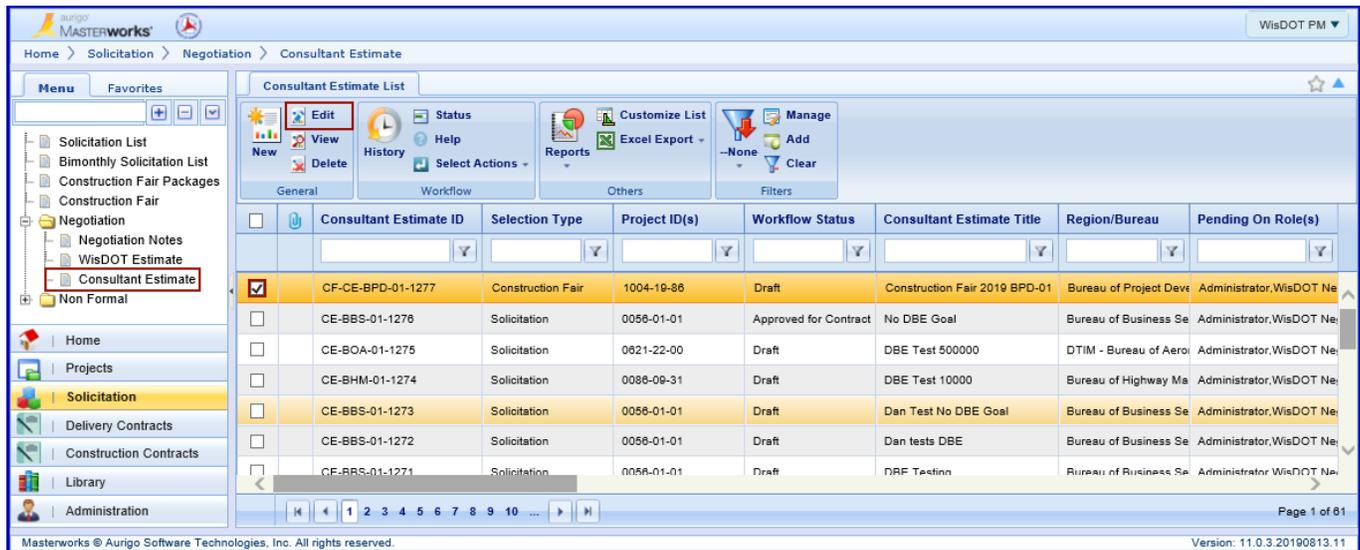
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2.4 Add Tasks to the Scope

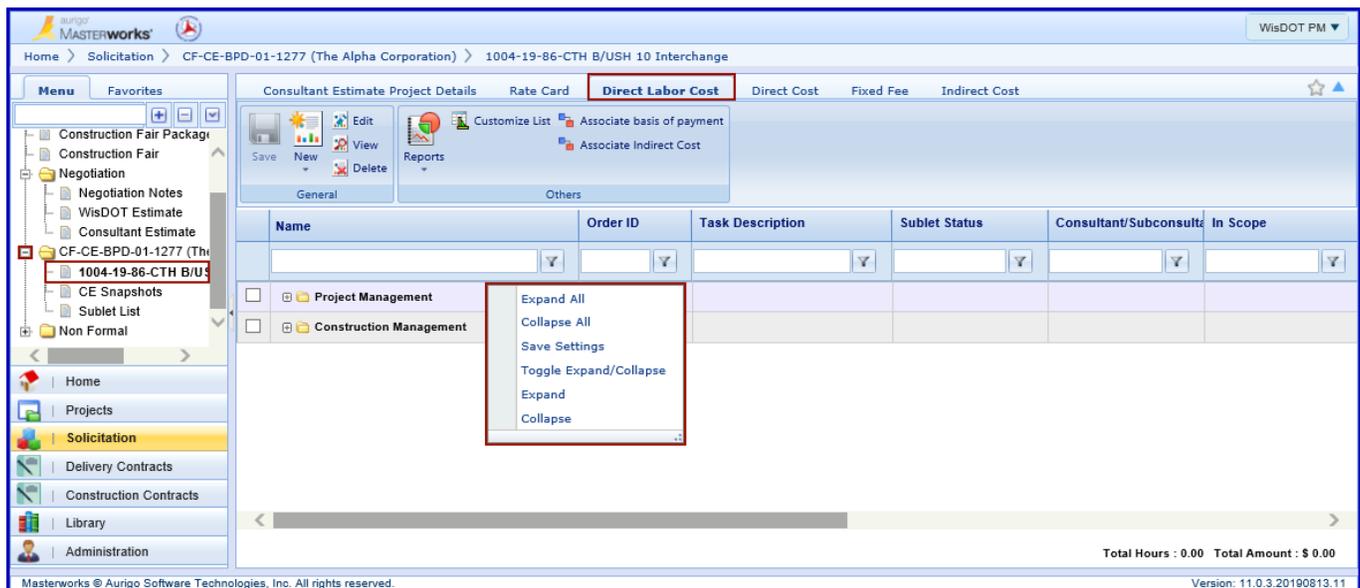
If a task needs to be added to the scope before the negotiation is sent to the consultant click **Save**.

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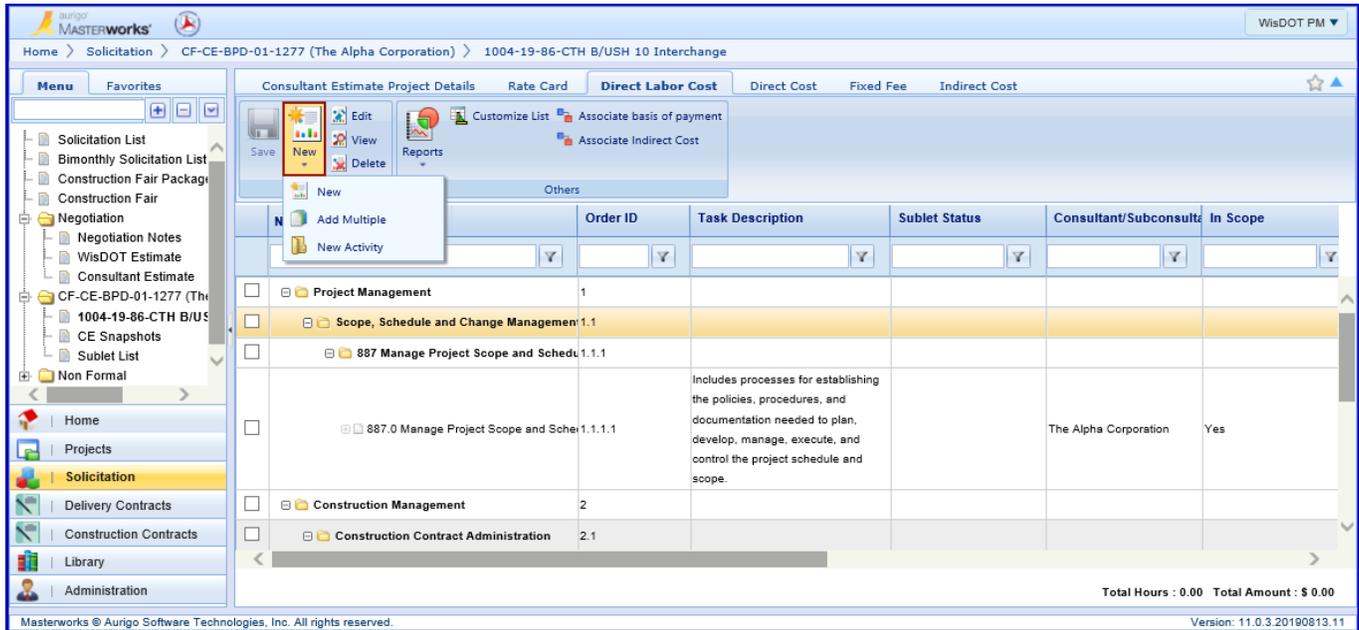
Check the box next to the negotiation in the Consultant Estimate list. Click **Edit**.



Expand the folder in the left navigation pane. Click on the link with the project ID. Click on the **Direct Labor Cost** tab on the top of the screen. Right click on the folder(s) in the middle of the screen and click **Expand All** to view all tasks currently under negotiation.

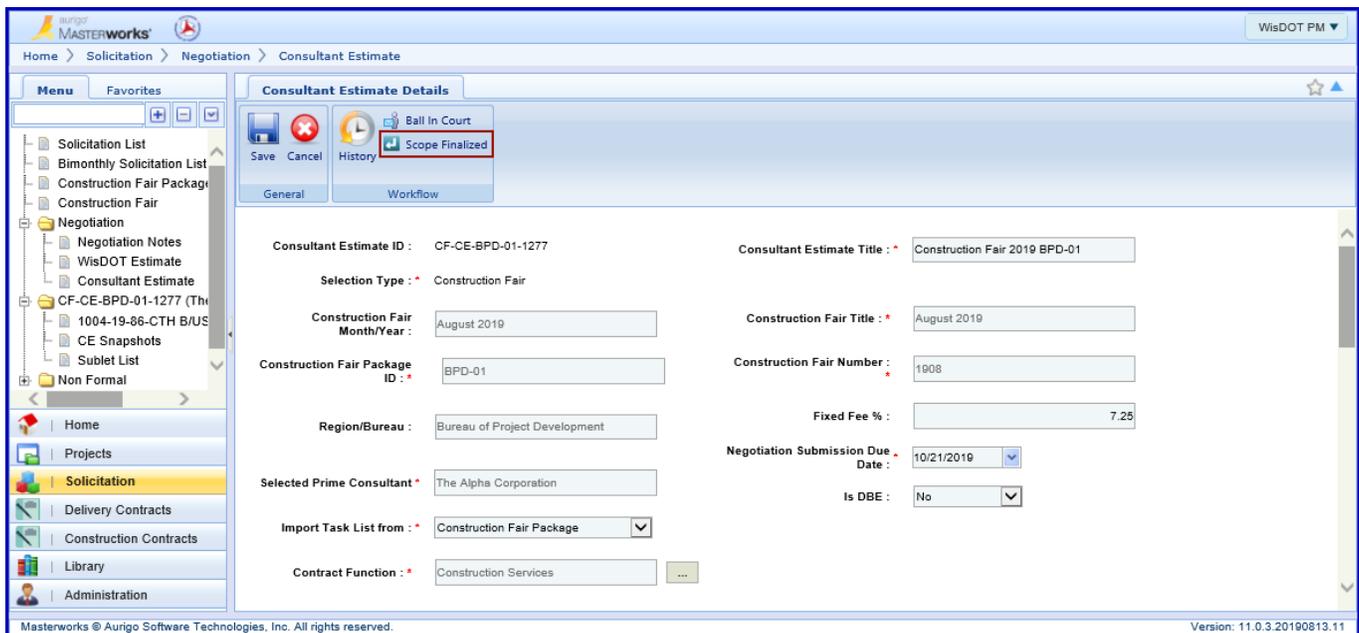


Use the **New** to add task(s) as outlined in section [Add a New Task](#) in this guide.



2.5 Send the Negotiation to the Consultant

If no changes needed to be made to the task list, click Scope Finalized.



If changes were made to the task list, or if the estimate was saved in Draft status before being submitted return to the Consultant Estimate list. Check the box next to the negotiation and click **Select Actions** and **Scope Finalized**.

	Consultant Estimate ID	Selection Type	Project ID(s)	Workflow Status	Consultant Estimate Title	Region/Bureau	Pending On Role(s)
<input checked="" type="checkbox"/>	CF-CE-BPD-01-1277	Construction Fair	1004-19-86	Draft	Construction Fair 2019 BPD-01	Bureau of Project Deve	Administrator,WisDOT Ne
<input type="checkbox"/>	CE-BBS-01-1276	Solicitation	0056-01-01	Approved for Contract	No DBE Goal	Bureau of Business Se	Administrator,WisDOT Ne
<input type="checkbox"/>	CE-BOA-01-1275	Solicitation	0621-22-00	Draft	DBE Test 500000	DTIM - Bureau of Aero	Administrator,WisDOT Ne
<input type="checkbox"/>	CE-BHM-01-1274	Solicitation	0086-09-31	Draft	DBE Test 10000	Bureau of Highway Ma	Administrator,WisDOT Ne
<input type="checkbox"/>	CE-BBS-01-1273	Solicitation	0056-01-01	Draft	Dan Test No DBE Goal	Bureau of Business Se	Administrator,WisDOT Ne
<input type="checkbox"/>	CE-BBS-01-1272	Solicitation	0056-01-01	Draft	Dan tests DBE	Bureau of Business Se	Administrator,WisDOT Ne
<input type="checkbox"/>	CE-BBS-01-1271	Solicitation	0056-01-01	Draft	DBE Testing	Bureau of Business Se	Administrator,WisDOT Ne
<input type="checkbox"/>	CE-NC-02-1270	Solicitation	1610-41-00	Draft	freeform test	North Central Region	Administrator,WisDOT Ne
<input type="checkbox"/>	CE-BPD-01-1269	Solicitation	1004-19-86	Scope Finalized	Specific Rate Example II	Bureau of Project Deve	Administrator,Consultant H

Click **OK** on the acknowledgement screen. No additional notes are needed.

Set Days To Complete for Next Stage :

Attachments

Document	Title	Uploaded By	Uploaded Date	File Size
No Attachments available				

A warning message will be displayed in the upper right corner of the screen indicating that the system was unable to send a message to the consultant. Please notify the consultant that it has a new negotiation to begin.

The screenshot displays the Masterworks software interface. At the top, there is a navigation bar with 'Home > Solicitation > Negotiation > Consultant Estimate'. A green notification box in the upper right corner contains the message: "Please contact the consultant that the Scope is Finalized." Below this, the 'Consultant Estimate List' is shown as a table with the following columns: Consultant Estimate ID, Selection Type, Project ID(s), Workflow Status, Consultant Estimate Title, Region/Bureau, and Pending On Role(s). The table contains several rows of data, including entries like 'CF-CE-BPD-01-1277' with 'Construction Fair' selection type and 'Scope Finalized' status. A left-hand menu shows various navigation options like 'Solicitation List', 'Negotiation', and 'Administration'. The bottom of the interface shows 'Page 1 of 81' and 'Version: 11.0.3.20190813.11'.

Consultant Estimate ID	Selection Type	Project ID(s)	Workflow Status	Consultant Estimate Title	Region/Bureau	Pending On Role(s)
CF-CE-BPD-01-1277	Construction Fair	1004-19-86	Scope Finalized	Construction Fair 2019 BPD-01	Bureau of Project Deve	Administrator, Consultant H
CE-BBS-01-1276	Solicitation	0056-01-01	Approved for Contract	No DBE Goal	Bureau of Business Se	Administrator, WisDOT Ne
CE-BOA-01-1275	Solicitation	0621-22-00	Draft	DBE Test 500000	DTIM - Bureau of Aero	Administrator, WisDOT Ne
CE-BHM-01-1274	Solicitation	0086-09-31	Draft	DBE Test 10000	Bureau of Highway Ma	Administrator, WisDOT Ne
CE-BBS-01-1273	Solicitation	0056-01-01	Draft	Dan Test No DBE Goal	Bureau of Business Se	Administrator, WisDOT Ne
CE-BBS-01-1272	Solicitation	0056-01-01	Draft	Dan tests DBE	Bureau of Business Se	Administrator, WisDOT Ne
CE-BBS-01-1271	Solicitation	0056-01-01	Draft	DBE Testing	Bureau of Business Se	Administrator, WisDOT Ne
CE-NC-02-1270	Solicitation	1610-41-00	Draft	freeform test	North Central Region	Administrator, WisDOT Ne
CE-BPD-01-1269	Solicitation	1004-19-86	Scope Finalized	Specific Rate Example II	Bureau of Project Deve	Administrator, Consultant H

3 Consultant Estimate – Consultant

Specific Rate Use

Staff performing services under a contract will be named in the contract. Possible substitute(s) will also be included. The substitutes added will be shown with minimal hours.

Substitutes within a resource classification must have similar rates of pay. EX – the project leader is a senior engineer with a wage of \$35/hr. One of the substitutes is the department manager with a wage of \$55/hr. When performing the duties of project leader, the substitute will have a specific similar to the primary resource.

Class rates may be used when specific staff are unknown. Consult with WisDOT to determine which resources must be named and which may be added at class rates. In general, resources including project managers and/or project leaders must be named. When including class rates supporting documentation must be added to the negotiation to substantiate the rate. An estimate may be created based on the weighted average wages of employees listed in the rate card.

Adding Substitutes to Rate Cards

To reduce the potential for amendments possible, known substitutes should be added to rate cards to establish a rate for the known employees. The substitutes are added to the rate card and weighted at 1% of the contribution to the rate card.

Adding Class Rates to Rate Cards

When unknown employees will be contribution to a resource classification a class rate. A resource with the name “Class Rate” is added to the consultant’s list of key staff and added to the rate card. The class rate is weighted at its expected contribution.

Example

In the example below, the known resources are contributing an estimated 90% of the resource class effort. An additional known substitute is contributing 1% of the resource class effort. Additional unknown employees (Con Tech Class Rate) are contributing and estimated 9% of the resource class effort. Dividing \$22.87 by 91% equals the Current Rate of the Con Tech Class Rate, in this case \$25.13.

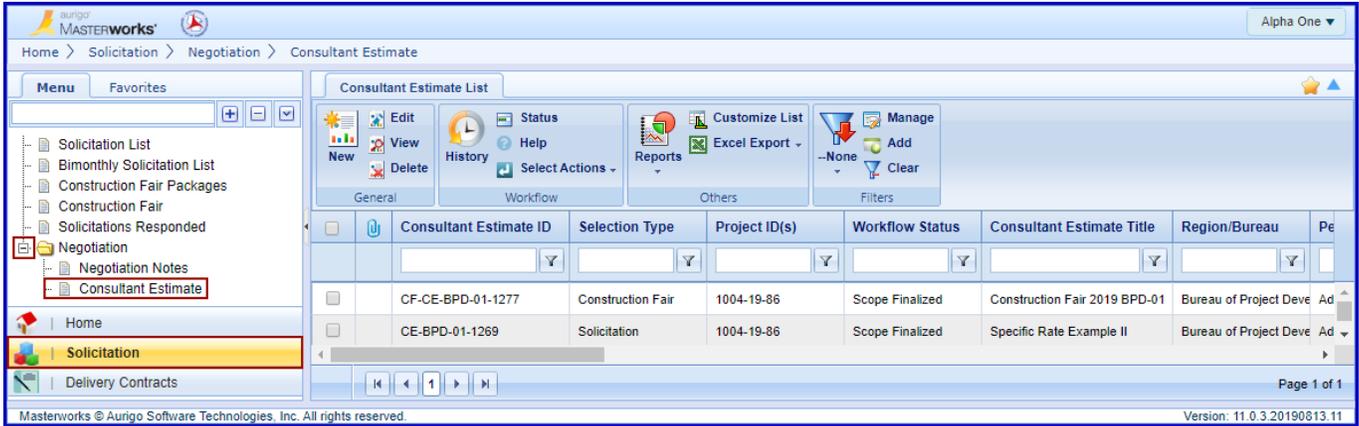
Construction Technician - Mid					
Employee Name	Current Rate	% Pay Increase	Date of Increase	% Work at Current Rate	% contribution on project
Alpha Con Tech One	\$24.00	0.00%	1/1/2020	100%	40%
Alpha Con Tech Two	\$26.00	0.00%	1/1/2020	100%	50%
Alpha Con Tech Three	\$27.00	0.00%	1/1/2020	100%	1%
Con Tech Class Rate	\$25.13	0.00%	1/1/2020	100%	9%

Class Rate Calculation	
\$24*40% =	\$9.60
\$26*50% =	\$13.00
\$27*1% =	\$0.27
-	-
91%	\$22.87
\$22.87/91% =	\$25.13

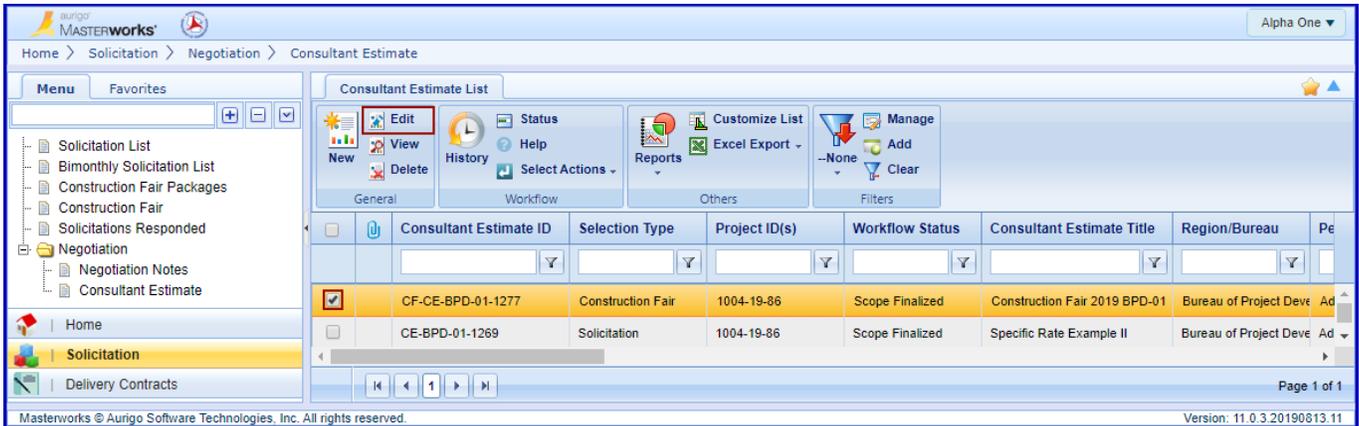
3.1 Finding the Negotiation

3.1.1 Prime Consultant

Navigate to the **Solicitation** module, expand the **Negotiation** folder in the left navigation and clicking **Consultant Estimate**.



Select the negotiation using the check box and click Edit.



The solicitation information is displayed on the top half of the screen.

The screenshot displays the Masterworks software interface. The top navigation bar includes 'Home > Solicitation > Negotiation > Consultant Estimate'. The left sidebar shows a tree view with 'Solicitation' selected. The main area is titled 'Consultant Estimate Details' and contains the following information:

Consultant Estimate ID :	CF-CE-BPD-01-1277	Consultant Estimate Title :	Construction Fair 2019 BPD-01
Selection Type :	Construction Fair	Construction Fair Title :	August 2019
Construction Fair Month/Year :	August 2019	Construction Fair Number :	1908
Construction Fair Package ID :	BPD-01	Fixed Fee % :	7.25
Region/Bureau :	Bureau of Project Development	Negotiation Submission Due Date :	10/21/2019
Selected Prime Consultant :	The Alpha Corporation	Is DBE :	No
Import Task List from :	Construction Fair Package		
Contract Function :	Construction Services		
Total Estimate Amount in \$:	0.00		

At the bottom of the window, it says 'Masterworks © Aurigo Software Technologies, Inc. All rights reserved.' and 'Version: 11.0.3.20190813.11'.

A summary of the negotiation cost is displayed. Any attachments included in the negotiation are included at the bottom. If the negotiation contains multiple projects, a separate line and subtotal will be displayed for each project.

Attachments made at this level will be visible to the prime consultant, subconsultants and WisDOT.

Consultant Estimate Details

Home > Solicitation > Negotiation > Consultant Estimate

Menu Favorites

Solicitation List
 Bimonthly Solicitation List
 Construction Fair Packages
 Construction Fair
 Solicitations Responded
 Negotiation
 Negotiation Notes
 Consultant Estimate
 CF-CE-BPD-01-1277 (The Alpha Corpor

Save Cancel History Ball In Court Publish ReDraft

General Workflow

Projects (In scope excluding If authorized)

Project ID	Project Name	Direct Labor Cost in \$	Direct Cost in \$	Indirect Cost in \$	Fixed Fee in \$	Total in \$	Total Hours	Marked as Final	Limit	Sublet
1004-19-86	Amherst - \$	0.00	0.00	0.00	0.00	0.00	0.00		CTH B/USF	No
		0.00	0.00	0.00	0.00	0.00	0.00			

Projects (If authorized)

Project ID	Project Name	Direct Labor Cost in \$	Direct Cost in \$	Indirect Cost in \$	Fixed Fee in \$	Total in \$	Total Hours	Marked as Final	Limit	Sublet
1004-19-86	Amherst - \$	0.00	0.00	0.00	0.00	0.00	0.00		CTH B/USF	No
		0.00	0.00	0.00	0.00	0.00	0.00			

DBE Goal on Project : * No

Notes :

Attachments

Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size
No Attachments available					

Link Document Upload Document

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Expand the folder with the Negotiation ID in the left navigation and click on the link with the project ID. A summary of project costs is displayed.

The screenshot displays the Masterworks software interface for a Consultant Estimate Project. The breadcrumb navigation shows the path: Home > Solicitation > CF-CE-BPD-01-1277 (The Alpha Corporation) > 1004-19-86-CTH B/USH 10 Interchange. The left navigation pane shows a tree view with '1004-19-86-CTH B/USH 10 Interchange' selected. The main content area is titled 'Consultant Estimate Project Details' and includes tabs for 'Rate Card', 'Direct Labor Cost', 'Direct Cost', 'Fixed Fee', and 'Indirect Cost'. The 'General' tab is active, showing fields for Consultant Estimate ID (CF-CE-BPD-01-1277), Construction Fair Package ID (BPD-01), Project ID (1004-19-86), Construction Fair Month and Year (August 2019), and Project Name (Amherst - Stevens Point). A description field is empty. The Measurement System is set to 'IS System'. Two cost summary tables are displayed: 'Cost Summary (In scope excluding If authorized)' and 'Cost Summary (If authorized)'. Both tables show zero values for Direct Labor Cost, Direct Cost, Fixed Fee, and Indirect Cost. The Estimate Total in \$ is 0.00, and the Estimate Total Auth in \$ is 0.00. The Estimate Total Hours is 0.00, and the Estimate Total Auth Hours is 0.00. An Attachments section at the bottom shows 'No Attachments available' with 'Link Document' and 'Upload Document' buttons. The footer contains 'Masterworks © Aurigo Software Technologies, Inc. All rights reserved.' and 'Version: 11.0.3.20190813.11'.

Home > Solicitation > CF-CE-BPD-01-1277 (The Alpha Corporation) > 1004-19-86-CTH B/USH 10 Interchange

Menu Favorites

Save

General

Consultant Estimate ID: CF-CE-BPD-01-1277

Construction Fair Package ID: BPD-01

Construction Fair Month and Year: August 2019

Project ID: 1004-19-86

Project Name: Amherst - Stevens Point

Description:

Measurement System: IS System

Cost Summary (In scope excluding If authorized)

Cost Type	Amount in \$
Direct Labor Cost	0.00
Direct Cost	0.00
Fixed Fee	0.00
Indirect Cost	0.00

Estimate Total in \$: 0.00

Estimate Total Hours: 0.00

Cost Summary (If authorized)

Cost Type	Amount in \$
Direct Labor Cost	0.00
Direct Cost	0.00
Fixed Fee	0.00
Indirect Cost	0.00

Estimate Total Auth in \$: 0.00

Estimate Total Auth Hours: 0.00

Attachments

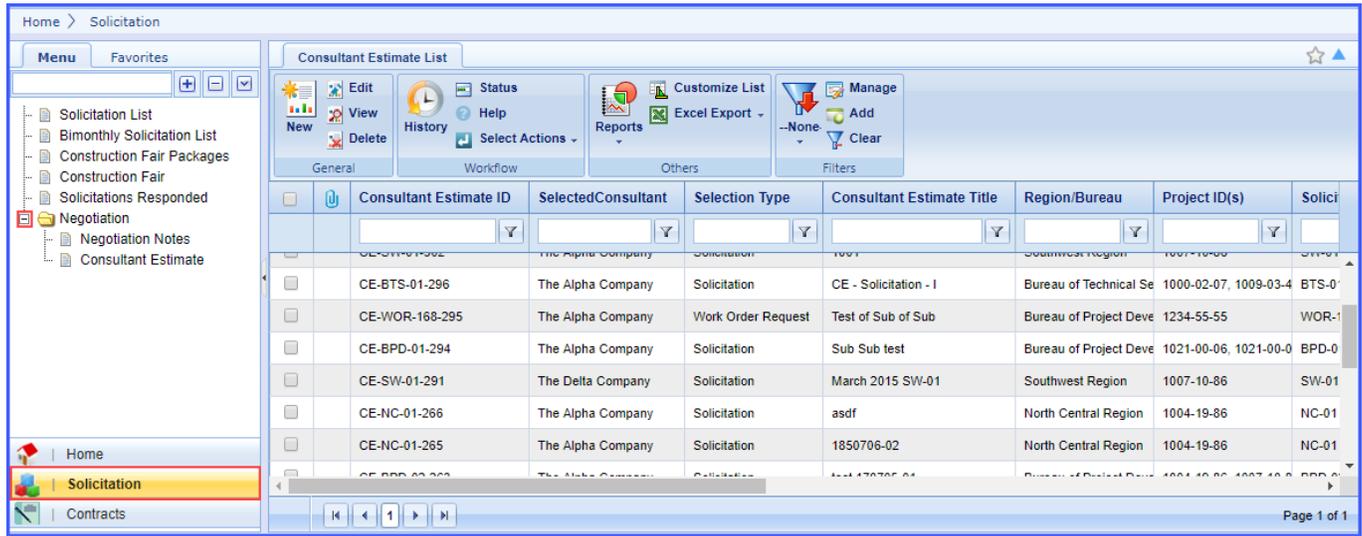
Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size
No Attachments available					

Link Document Upload Document

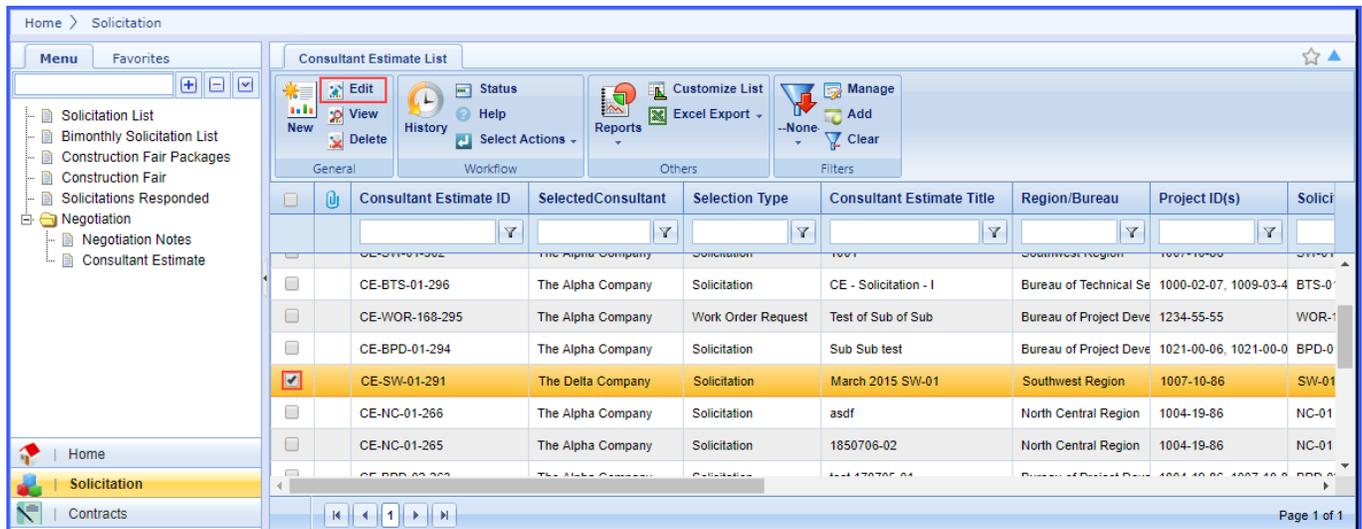
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3.1.2 Subconsultant

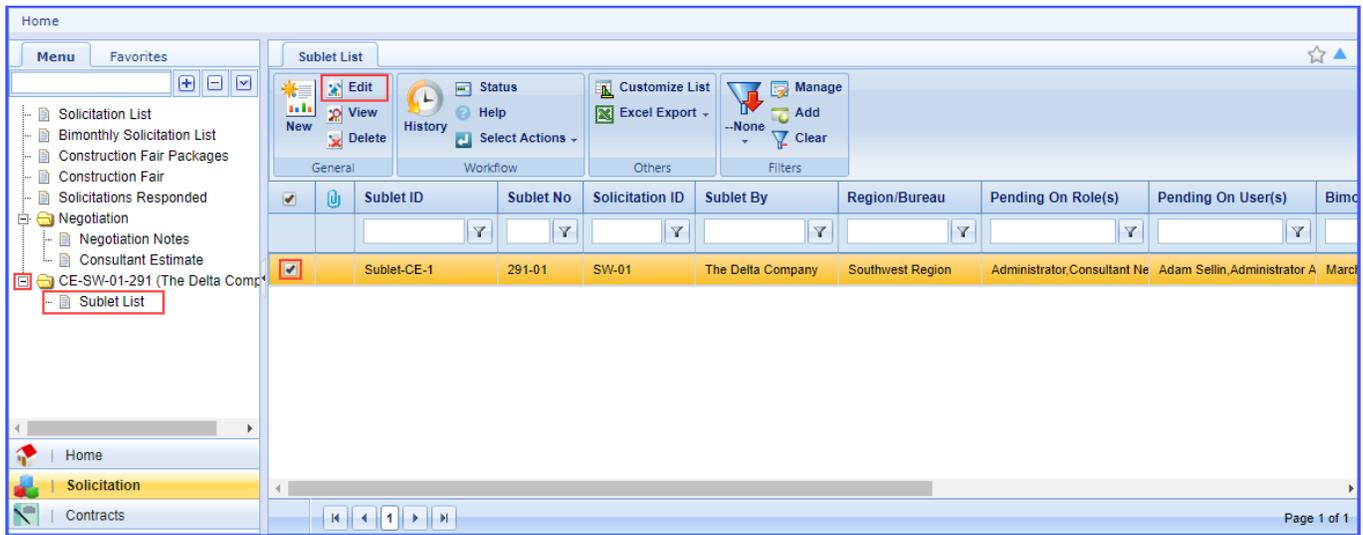
Navigate to the **Solicitation** module, expanding the **Negotiation** folder in the left navigation and clicking **Consultant Estimate**.



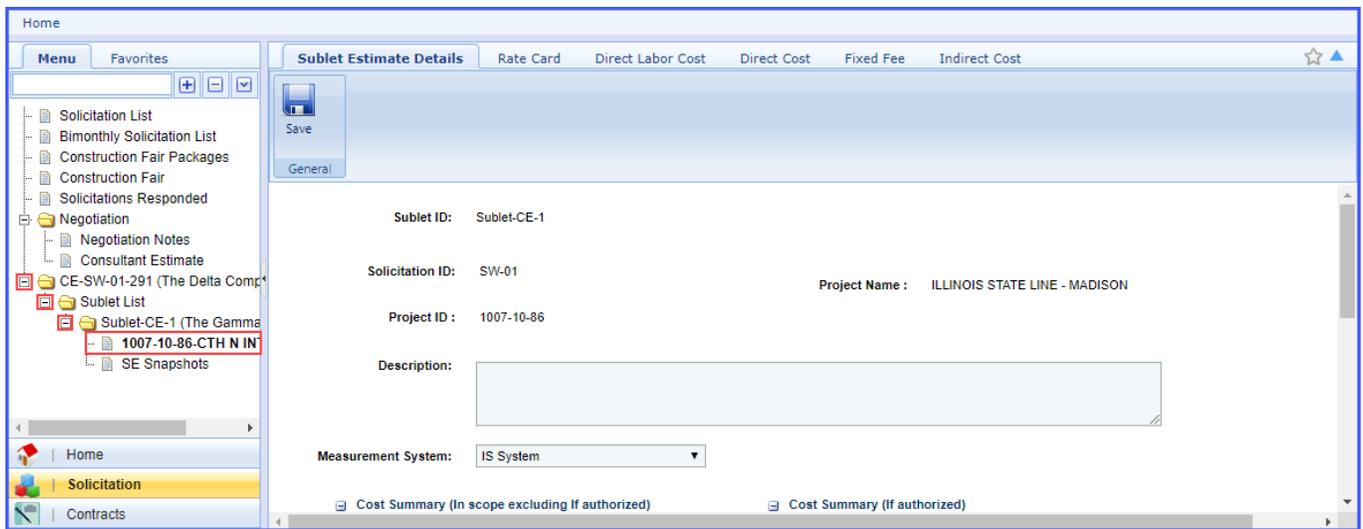
Check the box next to the negotiation and click **Edit**.



Expand the folder with the negotiation title and click Sublet List. Check the box next to negotiation and click **Edit**.



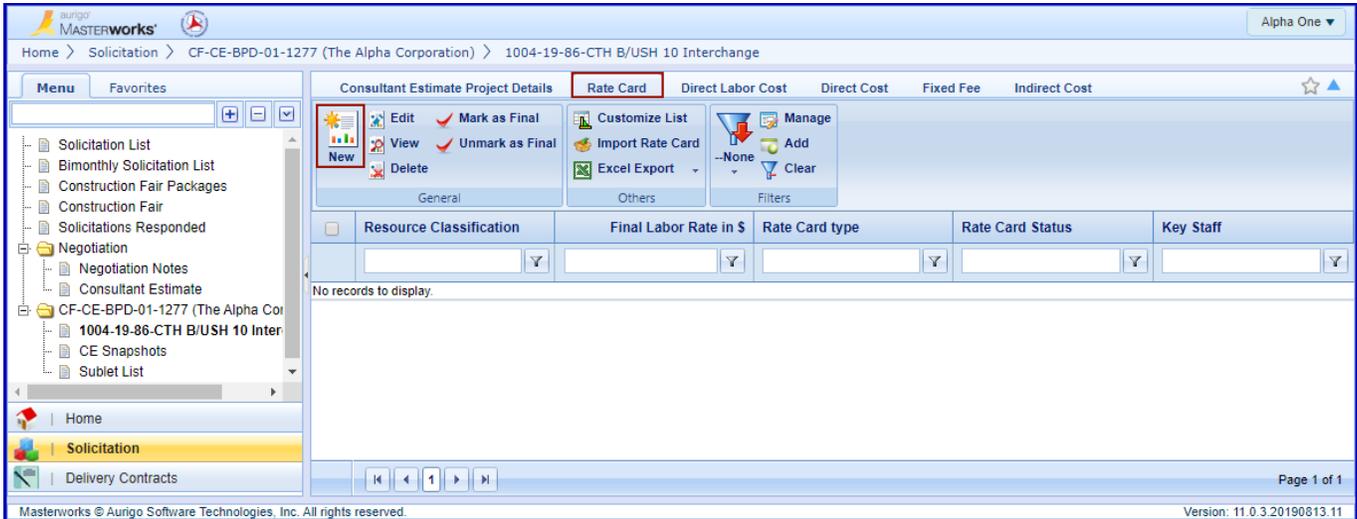
Expand the folders in the left navigation and click on the link with the project ID. A summary of project costs is displayed.



3.2 Create a Rate Card

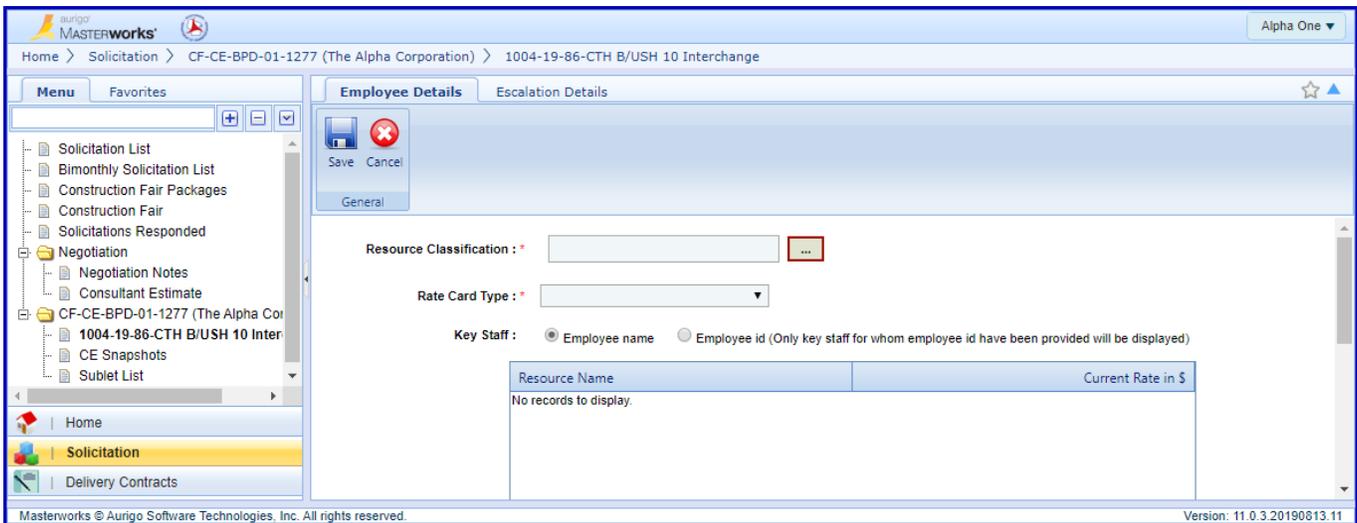
3.2.1 Create a new rate card

Click on the **Rate Card** tab and click **New**.

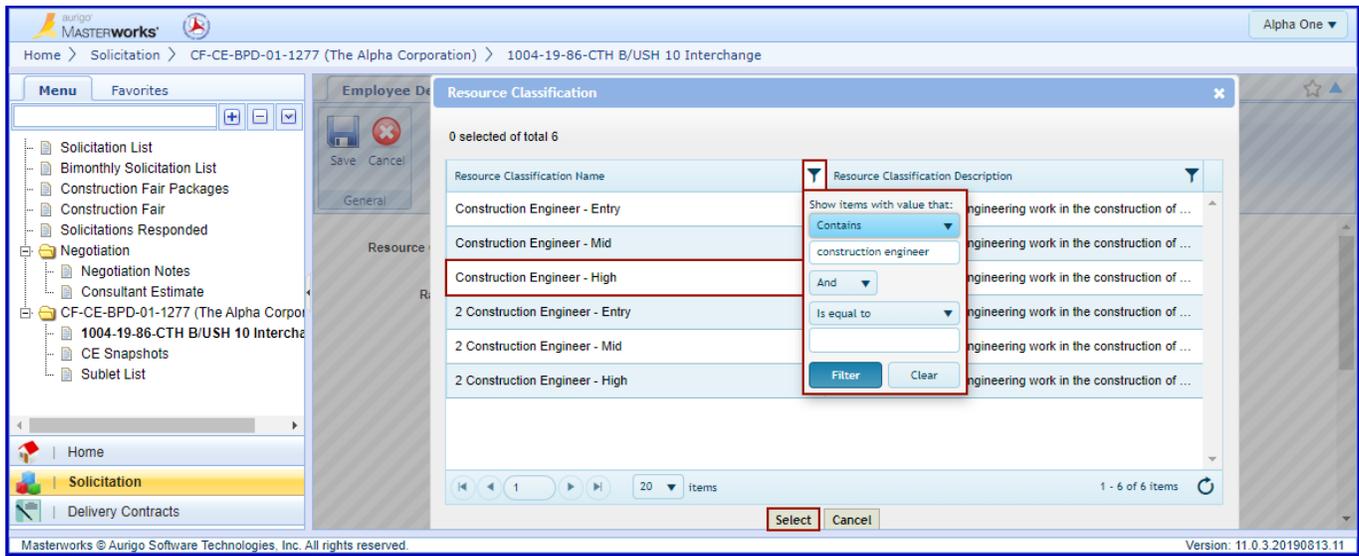


Click on the ellipses next to the **Resource Classification** field.

Once a Resource Classification and Rate Card Type are saved the rate card may not be changed.

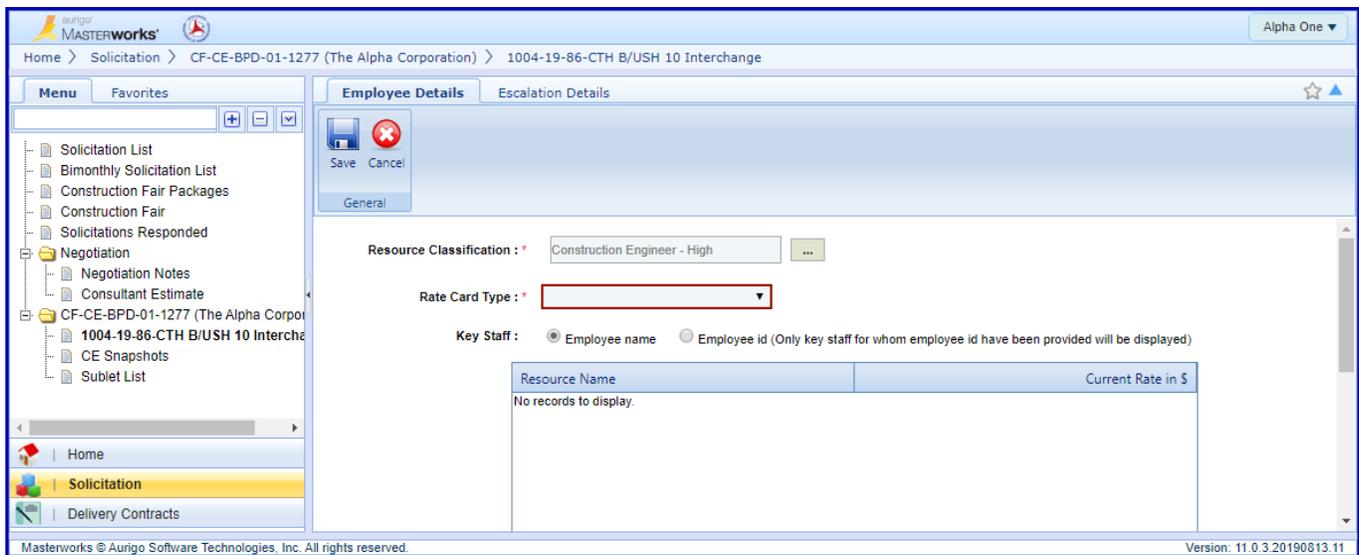


Use the filter to narrow the list of options, select the Resource Classification and click **Select**.

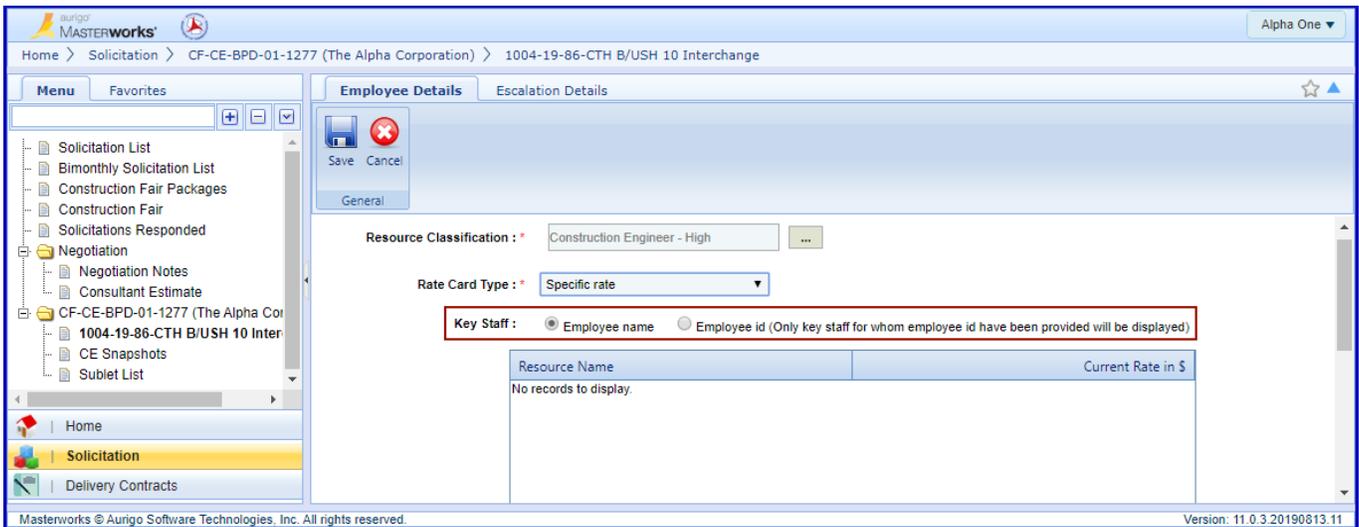


Select the **Rate Card Type** from the dropdown menu. Use Individual Wage when the basis of payment will be actual cost plus fixed fee or lump sum, NA when the basis of payment will be cost per unit and Specific Rate when the basis of payment will be specific rate of compensation.

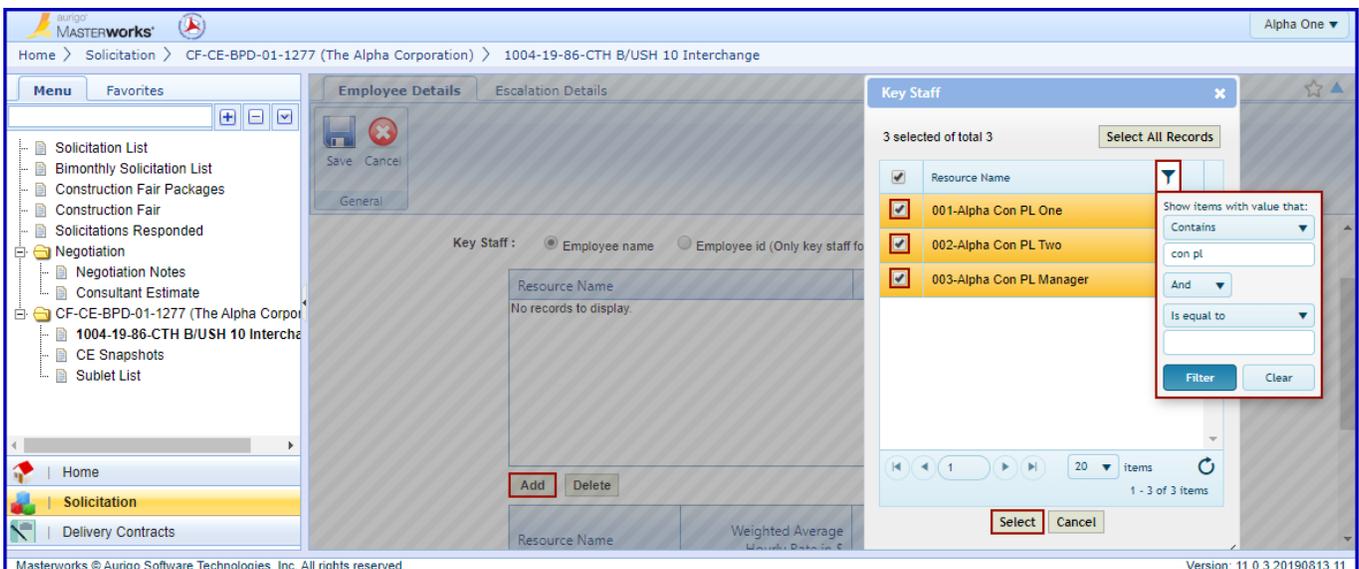
All construction engineering contracts use the Specific Rate Rate Card Type.



Choose the option to include employee names in the contract or only employee IDs.



Click **Add** underneath the first table to select employees that will be part of this resource classification. On the pop-up box that opens use the checkboxes to select one or more employees and click **Select**.



Double click in the box next to each employee in the column Current Rate and enter the current pay rate for each employee.

The screenshot shows the 'Employee Details' window in Masterworks. The breadcrumb path is: Home > Solicitation > CF-CE-BPD-01-1277 (The Alpha Corporation) > 1004-19-86-CTH B/USH 10 Interchange. The 'Key Staff' section has radio buttons for 'Employee name' (selected) and 'Employee id'. A table lists resources with their current rates:

Resource Name	Current Rate in \$
001-Alpha Con PL One	43
002-Alpha Con PL Two	45
003-Alpha Con PL Manager	

Buttons for 'Add' and 'Delete' are at the bottom of the table.

Click on the **Escalation details** tab, check box next to the employee and click **Edit**.

The screenshot shows the 'Escalation Details' window in Masterworks. The breadcrumb path is the same as the previous screenshot. The 'Escalation Details' tab is active. The 'Edit' button is highlighted with a red box. A table lists resources with their escalation details:

Resource Classificat	Employee Name	Weighted Average H	Multiplication Factor	Indirect Cost %	Fixed Fee %	Indirect Cost Type
<input type="checkbox"/>	Construction Engineer - 003-Alpha Con PL Man.		2.50		7.25	
<input type="checkbox"/>	Construction Engineer - 002-Alpha Con PL Two		2.50		7.25	
<input checked="" type="checkbox"/>	Construction Engineer - 001-Alpha Con PL One		2.50		7.25	

Buttons for 'Edit', 'View', 'Customize List', 'Manage', 'Add', and 'Clear' are visible above the table.

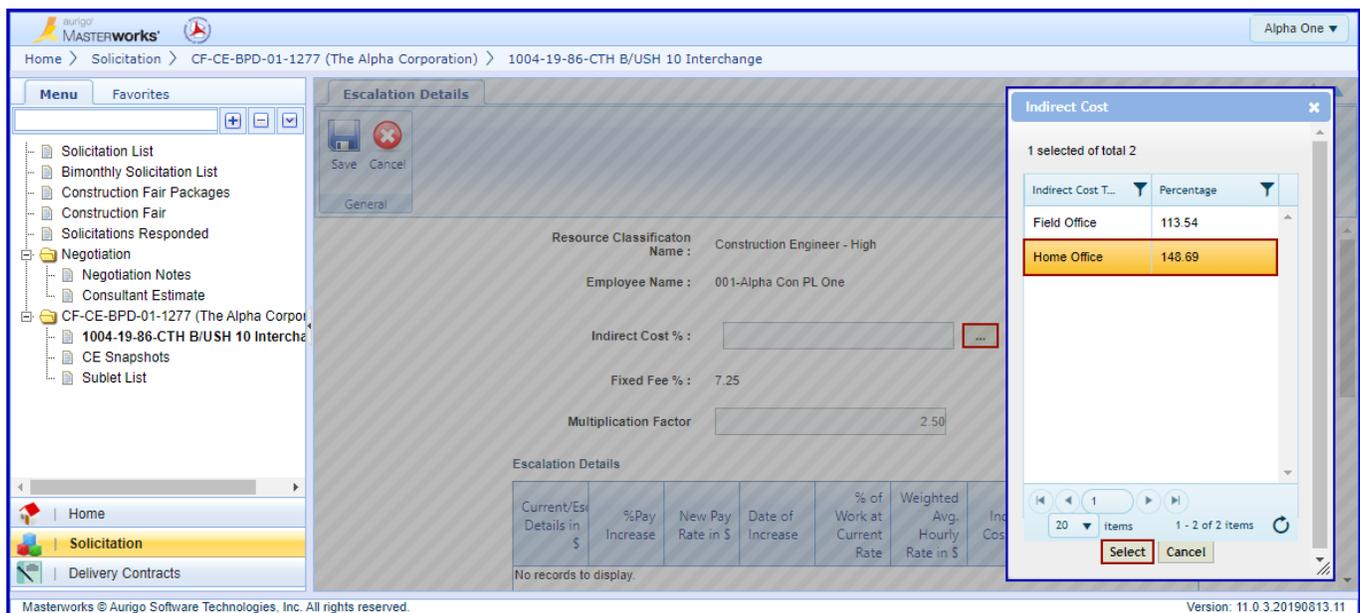
3.2.2 Add Specific Rate Escalation Details

Click on the ellipses next to the **Indirect Cost %** field. Select the indirect cost rate type from the popup box and click **Select**. The current indirect cost rate will be added. In most cases the indirect cost rate type will be Home Office. See FDM 8-10-20 for types on indirect cost rate accounting.

Do not mix indirect cost rate type within one rate card.

At this time indirect cost rates for specific rate basis of payment cannot be increased once a negotiation has started. If the indirect cost rate that appears is lower than the current rate contact WisDOT.

If specific rate rate card will be completed using market rates (no indirect cost or fixed fee,) please contact WisDOT to remove fixed fee.



First define the period the employee will be receiving the current rate of pay. Click **Add** underneath the table. Enter 0 as the **% pay increase**, today's date as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. If the employee will not be receiving escalation in the contract period enter 100 as the % of Work at Current Rate. Click **Save**.

The screenshot displays the Masterworks software interface. The main window is titled 'Escalation Details' and shows a table with columns: 'Current/Es Details in \$', '%Pay Increase', 'New Pay Rate in \$', and 'Date of Increase'. The table currently contains no records, displaying 'No records to display.' Below the table are 'Add', 'Edit', and 'Delete' buttons. A 'New Escalation Details' dialog box is open, showing the following fields:

- Current/Escalation Details in \$: 43.00
- %Pay Increase: 0.00
- New Pay Rate in \$: 43.00
- Date of Increase: 10/01/2019
- % of Work at Current Rate: 8.00
- Weighted Avg. Hourly Rate in \$: 3.44
- Indirect Cost in \$: 5.11
- Fixed Fee in \$: 0.62
- Actual Labor Related Rate in \$: 9.17

The 'Add' button in the main window and the 'Save' button in the dialog box are highlighted with red boxes. The software version is 11.0.3.20190813.11.

Next, define the period the employee will be receiving the escalated rate of pay. Click **Add** underneath the table. Enter the escalation rate as the **% pay increase**, the date of increase as the **Date of Increase** and the estimated amount of work that will be completed at this rate as the **% of Work at Current Rate**. Click **Save**.

The escalation rate may not exceed the amount published on WisDOT’s Consultant Notices webpage. (<https://wisconsin.gov/Pages/doing-bus/eng-consultants/notices/default.aspx>)

WisDOT reviews the maximum escalation factor annually. The 2019 factor of 3.1% may be reflected immediately for negotiations that have not been completed. All contracts submitted after February 14, 2019 must reflect this factor. Consultants apply wage escalation to estimates of work to be performed based on the relationship of the consultant's normal cycle for wage increases and the timing of work performed under the contract. Current pay rates along with dates of anticipated increases should be shown in supporting fee computations.

The screenshot shows the Masterworks software interface. On the left is a navigation tree with folders like 'Solicitation List', 'Negotiation', and 'CF-CE-BPD-01-1277 (The Alpha Corporation)'. The main area displays 'Escalation Details' with a table and an 'Add' button. A 'New Escalation Details' dialog box is open, showing input fields for %Pay Increase (3.10), Date of Increase (01/01/2020), and % of Work at Current Rate (84.00). Other fields include Current/Escalation Details in \$ (43.00), New Pay Rate in \$ (44.33), Weighted Avg. Hourly Rate in \$ (37.24), Indirect Cost in \$ (55.37), Fixed Fee in \$ (6.75), and Actual Labor Related Rate in \$ (99.36). Buttons for 'Save' and 'Cancel' are at the bottom of the dialog.

Current/Escalation Details in \$	%Pay Increase	New Pay Rate in \$	Date of Increase	% of Work at Current Rate	Weighted Avg. Hourly Rate in \$	Indirect Cost in \$	Fixed Fee in \$	Actual Labor Related Rate in \$
43.00	0.00	43.00	10/01/2019					
					3.44	5.11	0.62	9.17

Add escalation details until the % of Work at Current Rate sums to 100%.

The screenshot shows the 'Escalation Details' window in Masterworks. The table contains the following data:

Current/Es Details in \$	%Pay Increase	New Pay Rate in \$	Date of Increase	% of Work at Current Rate	Weighted Avg. Hourly Rate in \$	Indirect Cost in \$	Fixed Fee in \$	Actual Labor Related Rate in \$
43.00	0.00	43.00	10/01/2019	8.00	3.44	5.11	0.62	9.17
43.00	3.10	44.33	01/01/2020	84.00	37.24	55.37	6.75	99.36
44.33	3.10	45.70	01/01/2021	8.00	3.66	5.44	0.66	9.76
					44.34	65.92	8.03	118.29

Buttons: Add, Edit, Delete

Complete the Escalation Details for the remaining employees.

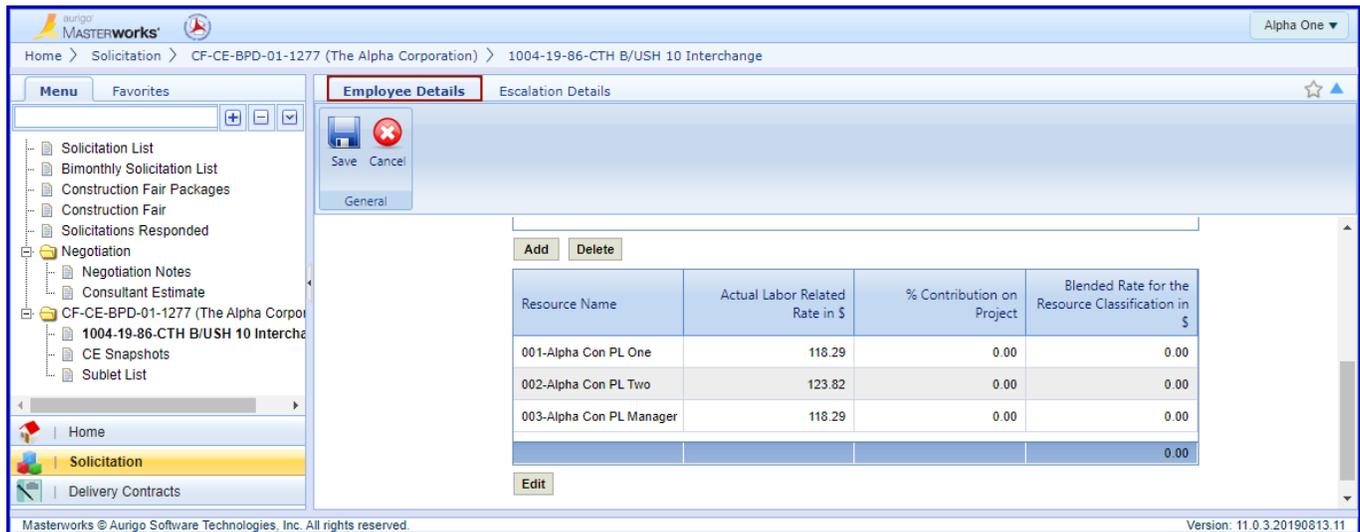
The screenshot shows the 'Employee Details' window in Masterworks. The table contains the following data:

Resource Classification	Employee Name	Weighted Average H	Multiplication Factor	Indirect Cost %	Fixed Fee %	Indirect Cost Type
<input type="checkbox"/>	Construction Engineer - 003-Alpha Con PL Man	118.29	2.50	148.69	7.25	Home Office
<input type="checkbox"/>	Construction Engineer - 002-Alpha Con PL Two	123.82	2.50	148.69	7.25	Home Office
<input type="checkbox"/>	Construction Engineer - 001-Alpha Con PL One	118.29	2.50	148.69	7.25	Home Office

Page 1 of 1

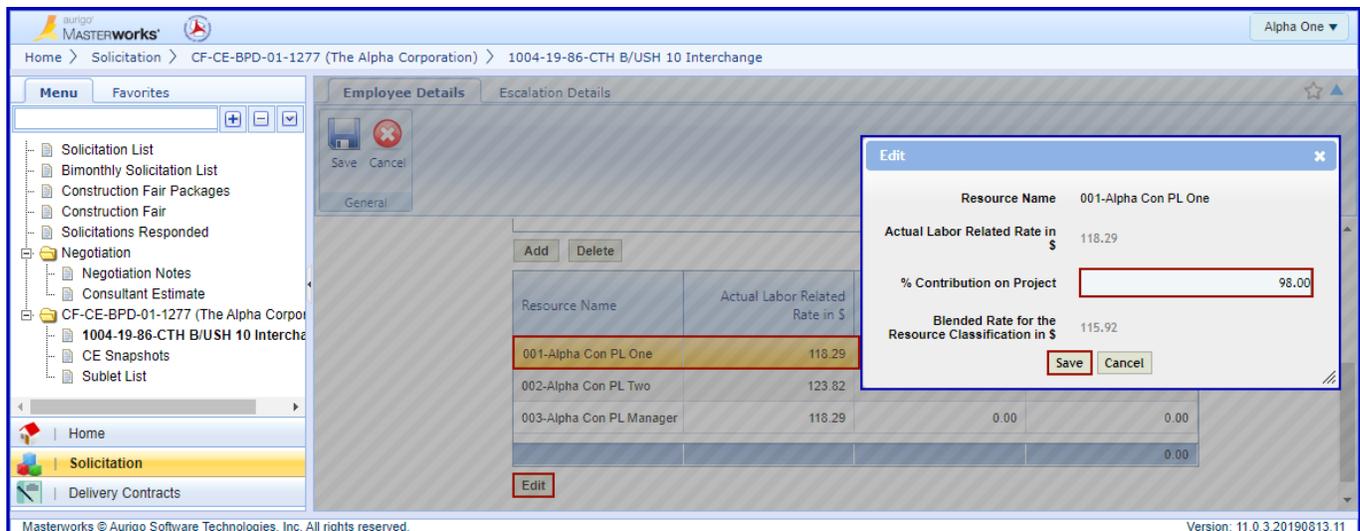
3.2.3 Weight Employee Contributions

When the escalation has been completed for all employees click **Employee Details**.



The escalated wages are brought back to the Employee Details page and the contribution of each employee to the contract must be defined. Select the first employee and click on **Edit**. In the pop-up box enter the employee's estimated contribution to the contract within this classification in the **% contribution to project** and click **Save**.

Substitutes are given a % contribution to project of 1%.



Complete the weighting for the remaining employee(s).

The % contribution to project must sum to 100.

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Resource Name	Actual Labor Related Rate in \$	% Contribution on Project	Blended Rate for the Resource Classification in \$
001-Alpha Con PL One	118.29	98.00	115.92
002-Alpha Con PL Two	123.82	1.00	1.24
003-Alpha Con PL Manager	118.29	1.00	1.18
			118.34

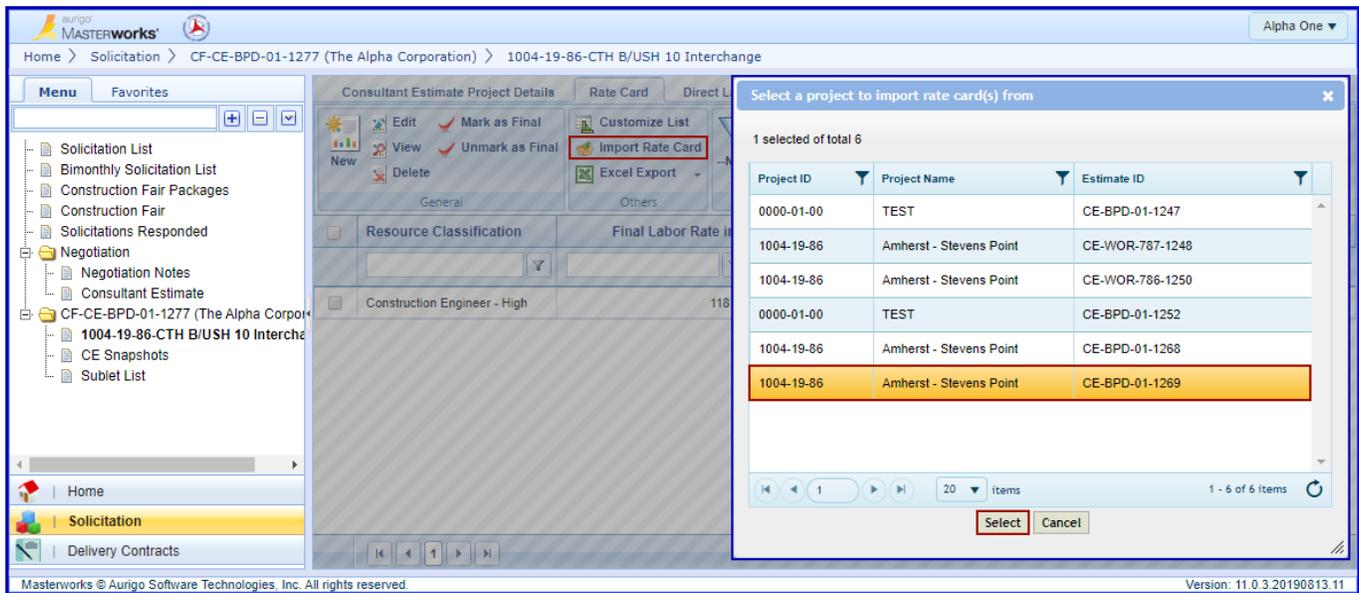
Click Save after the weighting is complete.

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Resource Name	Actual Labor Related Rate in \$	% Contribution on Project	Blended Rate for the Resource Classification in \$
001-Alpha Con PL One	118.29	98.00	115.92
002-Alpha Con PL Two	123.82	1.00	1.24
003-Alpha Con PL Manager	118.29	1.00	1.18
			118.34

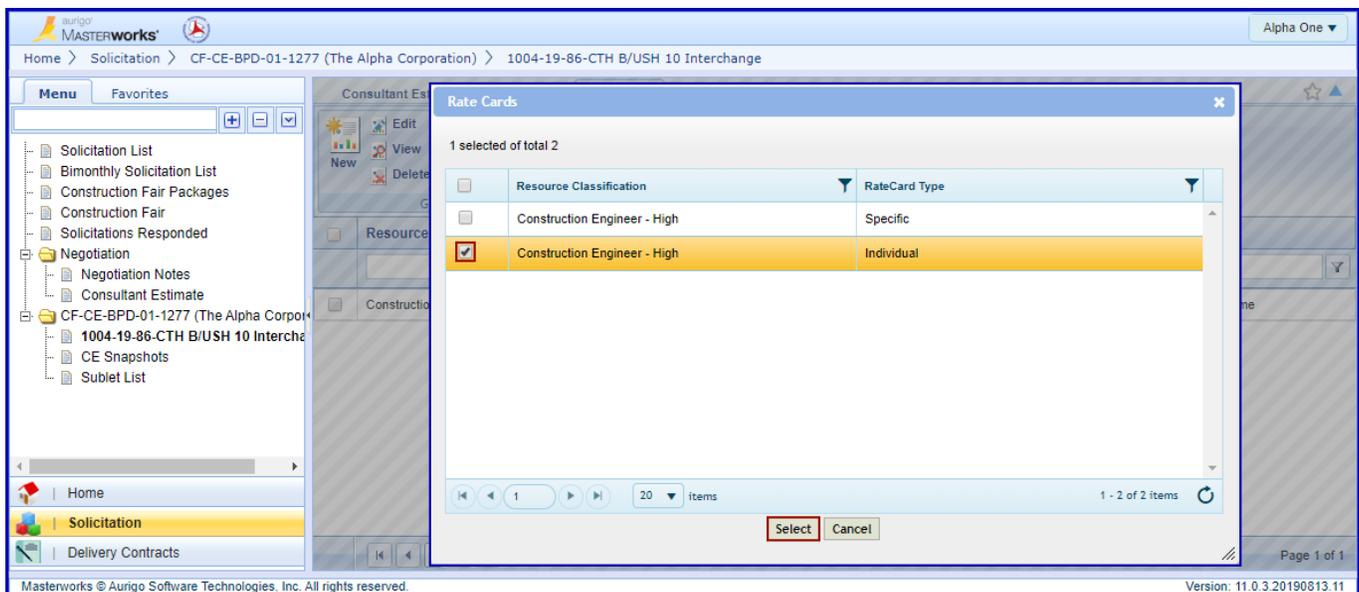
3.2.4 Import a Rate Card

A rate card may also be imported from a previous negotiation. To import a rated card click Import Rate Card. In the pop-up box select a negotiation and click **Select**.



In the next pop up box that appears check the box next to the rate card to be imported and click Select.

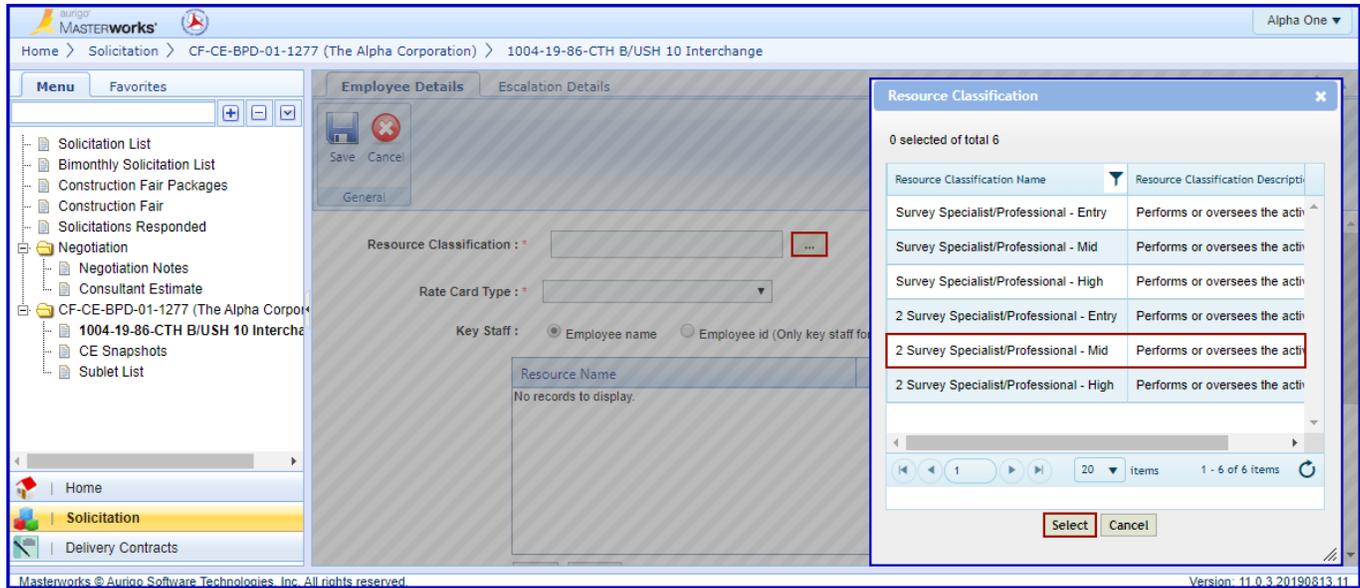
A Resource Classification – Rate Card Type combination may not be duplicated in the negotiation.



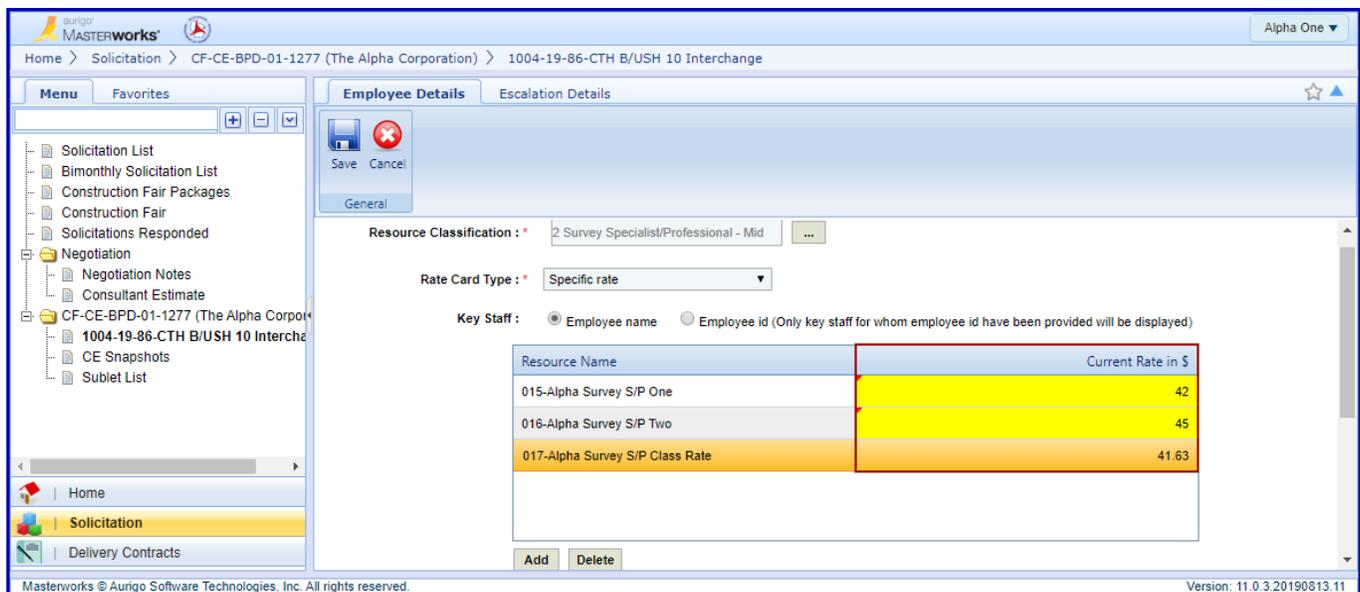
3.2.5 Premium Pay with Indirect Cost Applied

When indirect costs will be applied to the full cost of the premium wage.

Begin a new rate card for the classification receiving premium pay. Select the Resource Classification with the “2” prefix.



Add the employees at the base premium rate.



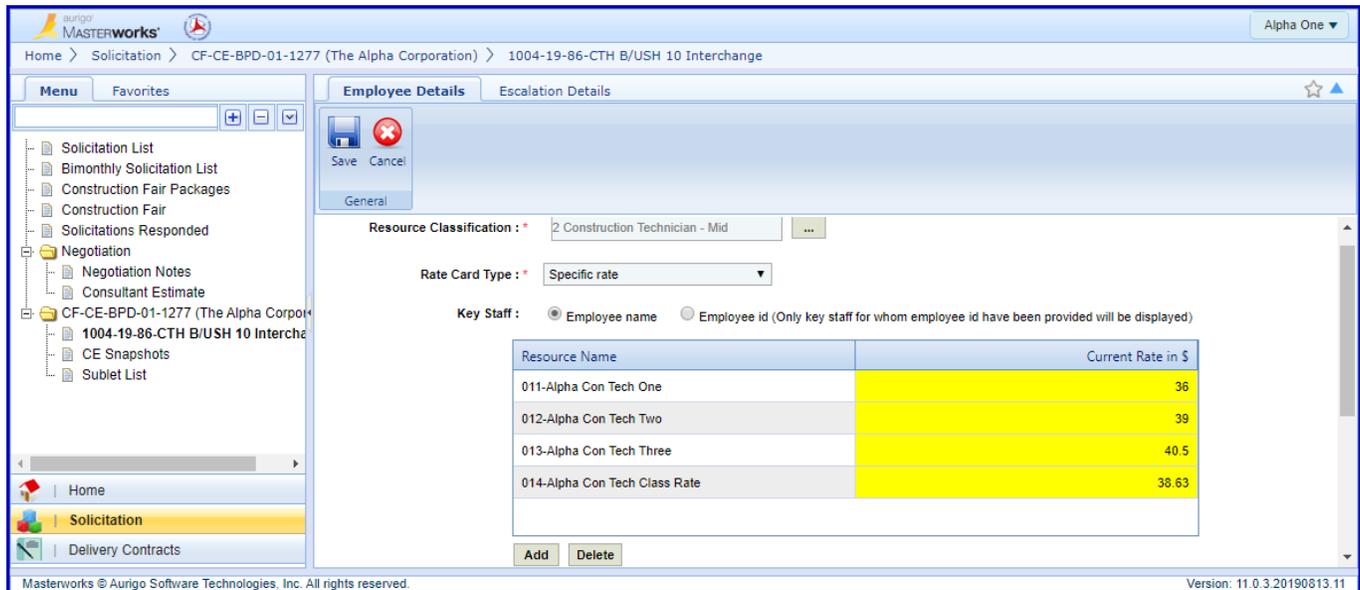
Complete the Escalation Details as outlined previously.

3.2.6 Premium Pay without Indirect Cost Applied

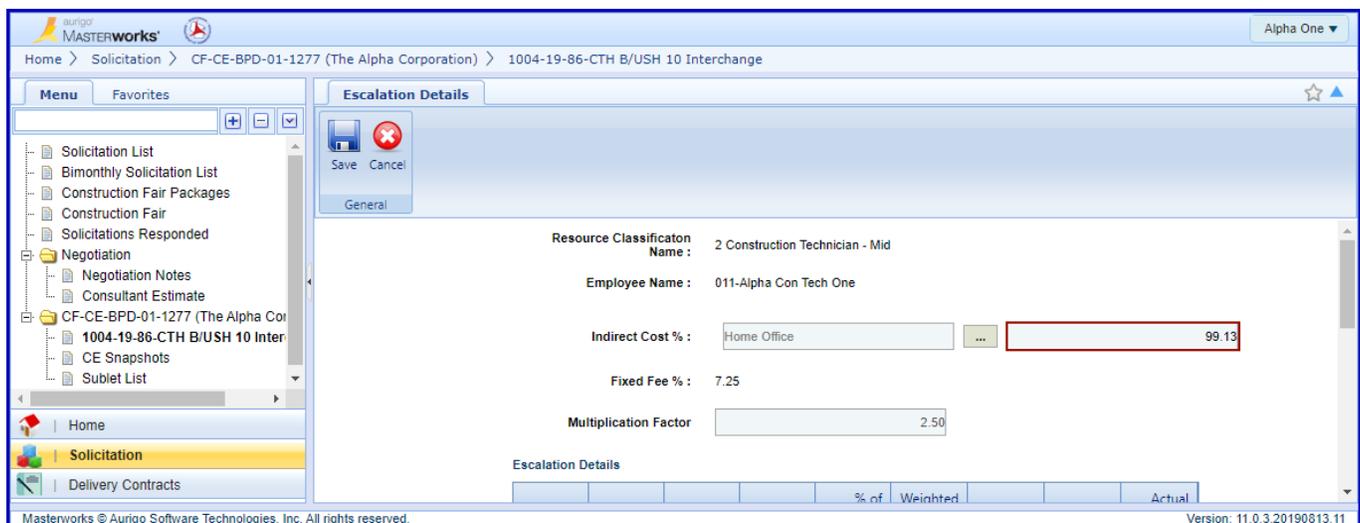
When indirect costs will not be applied to the premium portion of the wage the indirect cost rate will be factored down. In the case of overtime paid at 1.5 times the base wage, the indirect cost rate will be reduced by 1/3.

Begin a new rate card for the classification receiving premium pay. Select the Resource Classification with the “2” prefix.

Add the employees at the base premium rate.



Move to the Escalation Details tab and begin escalation for the first employee. Select the appropriate indirect cost rate type. Edit the indirect cost rate down to the appropriate level. In the case of time and one-half overtime, this will be 2/3 of the approved rate.



Complete the rate card as outlined previously.

3.2.7 Complete the Rate Card

Mark the rate card(s) final by selecting it using the checkbox and clicking **Mark as Final**.

The screenshot shows the Masterworks software interface with the 'Rate Card' tab selected. The 'Mark as Final' button in the top toolbar is highlighted with a red box. Below the toolbar is a table with the following data:

<input checked="" type="checkbox"/>	Resource Classification	Final Labor Rate in \$	Rate Card type	Rate Card Status	Key Staff
<input checked="" type="checkbox"/>	2 Construction Technician - Mid	83.35	Specific	Not Final	Employee name
<input checked="" type="checkbox"/>	2 Survey Specialist/Professional -	114.37	Specific	Not Final	Employee name
<input checked="" type="checkbox"/>	Survey Specialist/Professional - M	76.25	Specific	Not Final	Employee name
<input checked="" type="checkbox"/>	Construction Technician - Mid	68.19	Specific	Not Final	Employee name
<input checked="" type="checkbox"/>	Construction Specialist/Professio	75.24	Specific	Not Final	Employee name
<input checked="" type="checkbox"/>	Construction Engineer - Mid	86.57	Specific	Not Final	Employee name
<input checked="" type="checkbox"/>	Construction Engineer - High	118.34	Specific	Not Final	Employee name

Click **OK** on the warning message that appears.

The screenshot shows the same Masterworks software interface as above, but with a warning dialog box overlaid. The dialog box contains the following text:

wisdotstaging.masterworkslive.com says
Mark as final will update the rates against task(s) with selected rate card type. Do you wish to continue?

The 'OK' button in the dialog box is highlighted with a red box.

The Rate Card Status should now show Final.

The screenshot displays the Masterworks software interface. The breadcrumb navigation shows: Home > Solicitation > CF-CE-BPD-01-1277 (The Alpha Corporation) > 1004-19-86-CTH B/USH 10 Interchange. The 'Rate Card' tab is active, showing a table with the following data:

Resource Classification	Final Labor Rate in \$	Rate Card type	Rate Card Status	Key Staff
<input type="checkbox"/> 2 Construction Technician - Mid	83.35	Specific	Final	Employee name
<input type="checkbox"/> 2 Survey Specialist/Professional -	114.37	Specific	Final	Employee name
<input type="checkbox"/> Survey Specialist/Professional - M	76.25	Specific	Final	Employee name
<input type="checkbox"/> Construction Technician - Mid	68.19	Specific	Final	Employee name
<input type="checkbox"/> Construction Specialist/Profession	75.24	Specific	Final	Employee name
<input type="checkbox"/> Construction Engineer - Mid	86.57	Specific	Final	Employee name
<input type="checkbox"/> Construction Engineer - High	118.34	Specific	Final	Employee name

Page 1 of 1
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3.3 Direct Labor Cost

Level of Task Detail to be Included

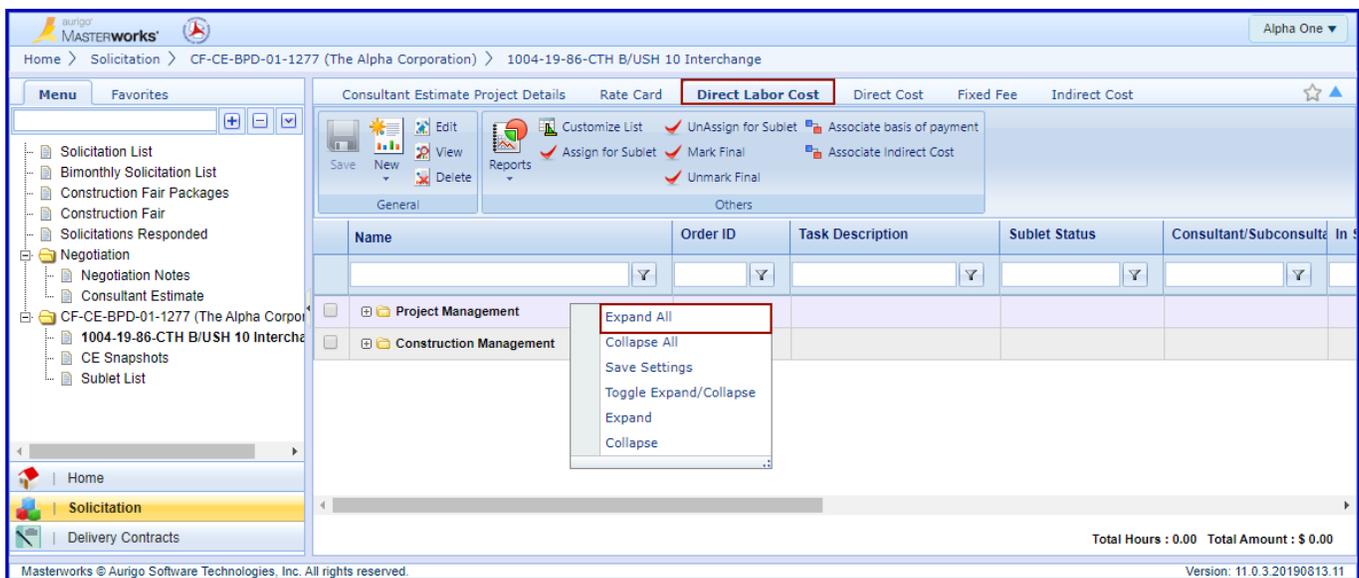
WisDOT has developed a work breakdown structure that includes tasks that may be included in the Direct Labor Cost. Each activity is broken down into a summary task and detailed tasks. The summary task is the task that ends with “.0”; the detailed tasks end with “.1-x”. When negotiating construction engineering, detailed tasks do not need to be included, but all activities the consultant is anticipated to perform must be included as a summary task.

In the example below the green row is known as a function, blue as a sub function, light orange as an activity, light yellow as a summary task and white as detailed tasks. If the consultant will be performing any of the detailed tasks the summary task, 271.0, must be included; but the detailed tasks may be omitted.

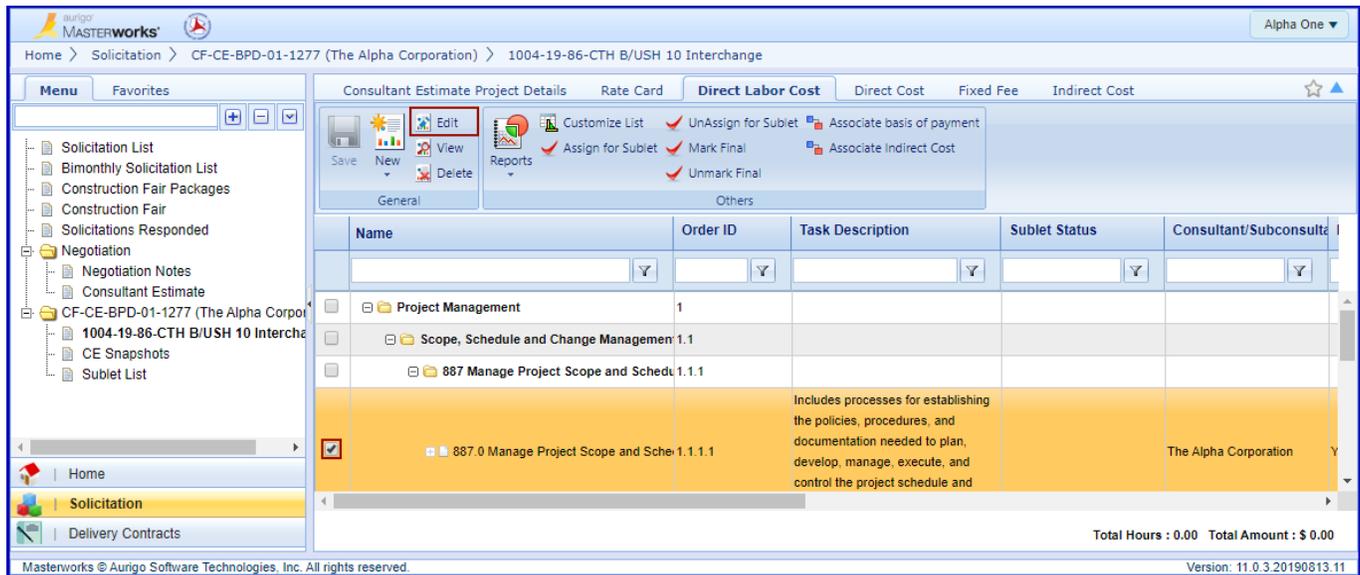
Construction Management	
Construction Contract Administration	
271	Perform Construction Surveying
271.0	Construction Surveying - includes construction staking, quantity measurement, as-built development, and digital file storage for archive.
271.1	Initial preparation/checking
271.2	Perform construction staking
271.3	Survey quantity measurements/computation
271.4	Develop as built
271.5	Digital file storage for archive

3.3.1 Entering Direct Labor

Click on the **Direct Labor Cost** tab. Right click on the folders that appear and click **Expand All**.



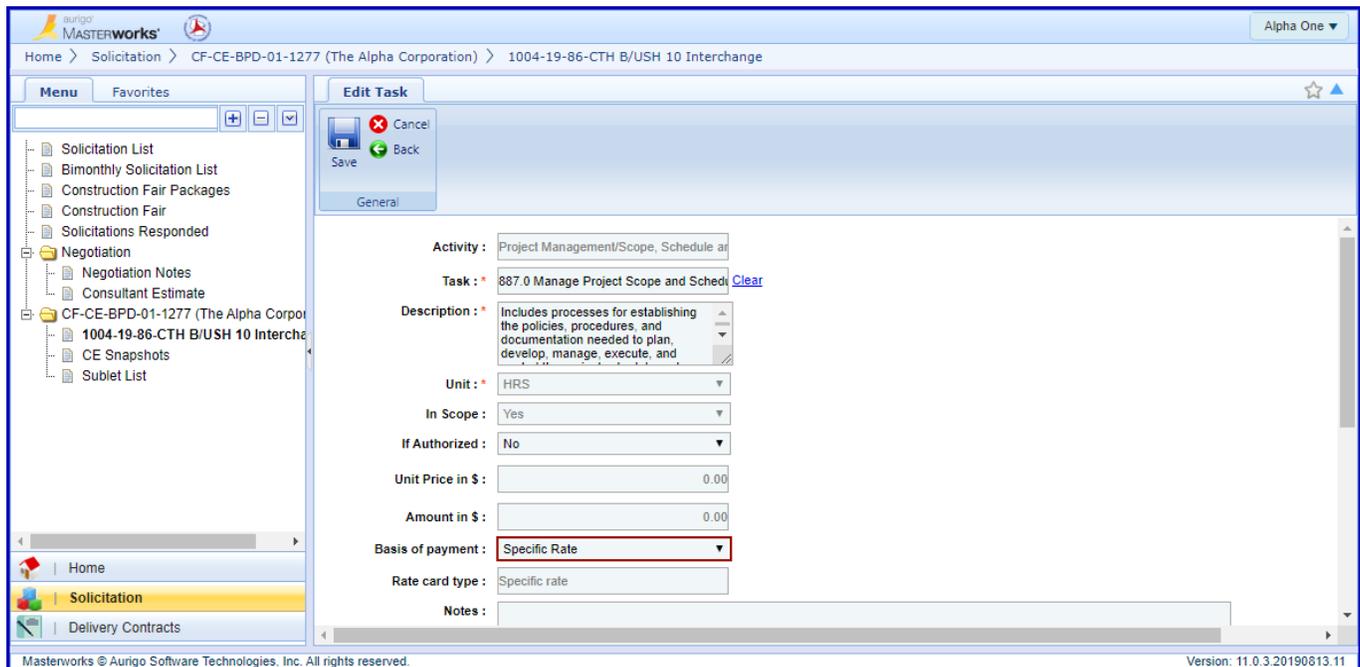
Check the box next to the first task and click **Edit**.



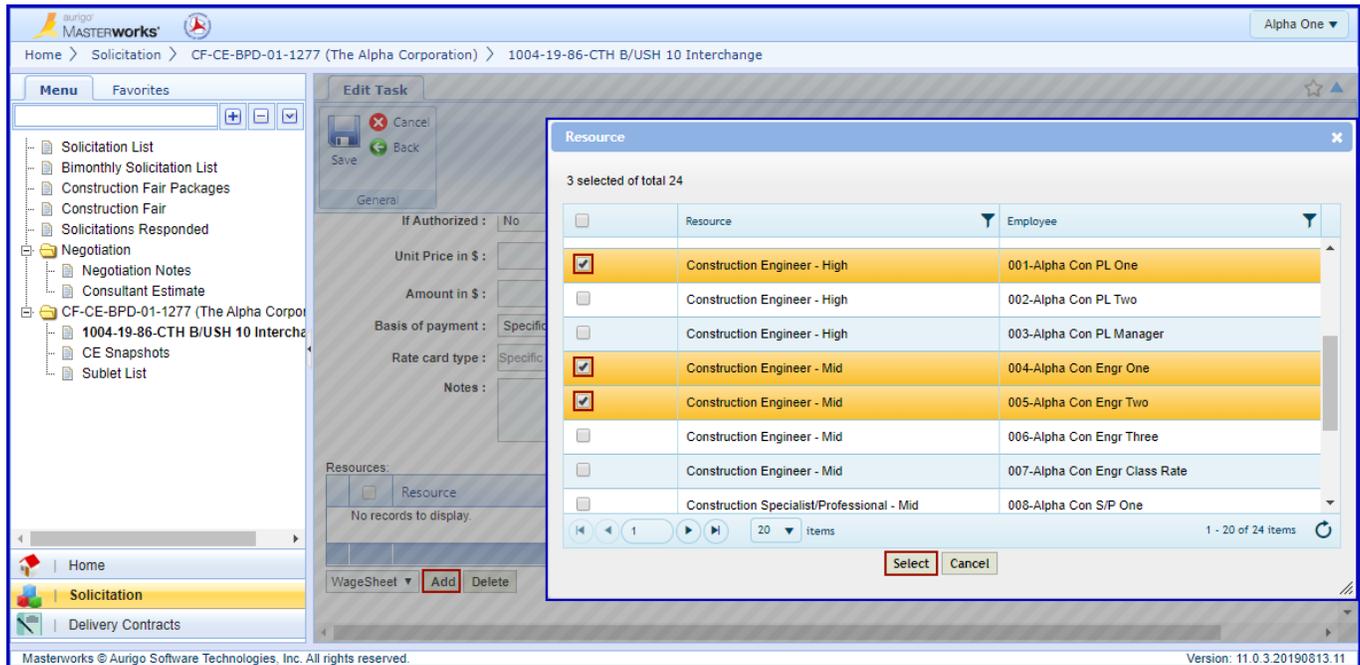
A description of the task will be displayed. If Authorized will default to No. Select the Basis of Payment from the dropdown menu. Notes may be added to include any assumptions made.

In most cases the field for If Authorized should be set to No. This indicates that the task will be part of the initial contract authorization.

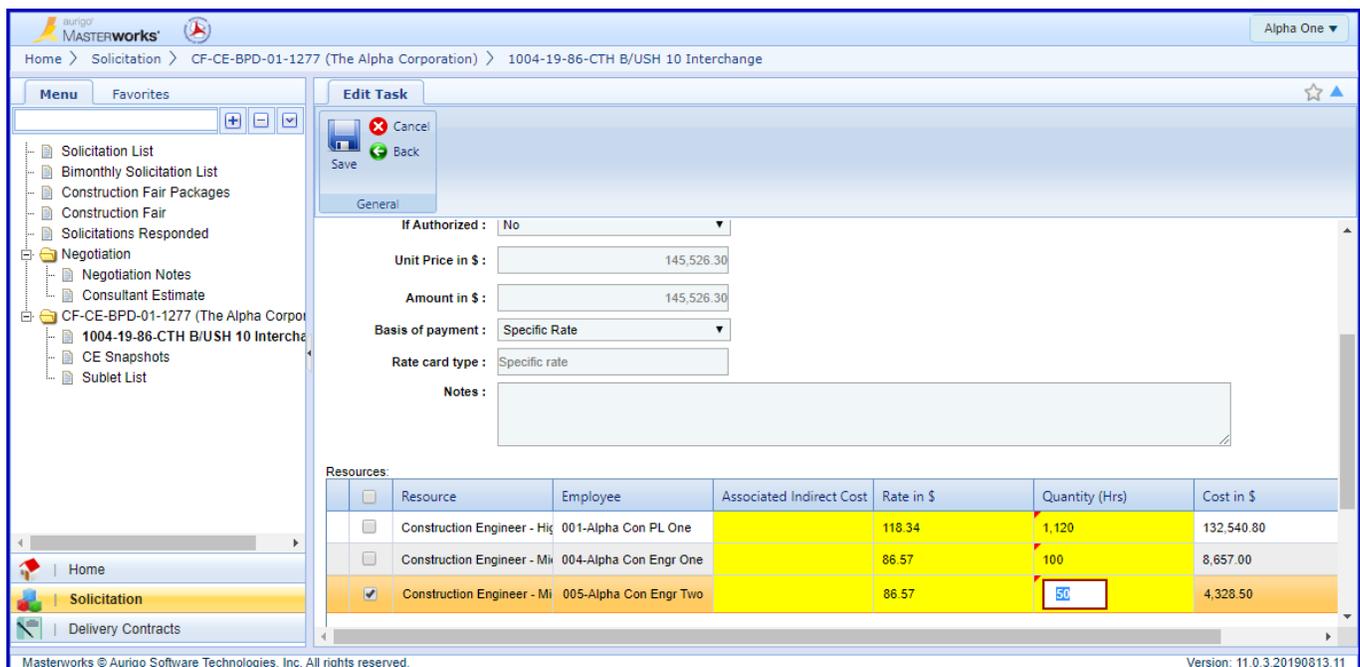
Once a Basis of Payment is selected, if it is changed it will delete any resources that have been added to the task.



Click on the **Add** button beneath the Resources table. Check the box next to the resource(s) that will be working on the task and click **Select**.



An **Associated Indirect Cost** does not need to be added for specific rate basis of payment. Double click in the cell in the **Quantity (Hrs)** column and enter the estimated number of hour this resource will take to complete the task.



Click outside of the yellow cell so that red triangles appear in the upper left corners. Click **Save** and then click **Back** to return to the task list.

The screenshot shows the 'Edit Task' window in Masterworks. The left sidebar contains a navigation tree with 'Solicitation' selected. The main area is titled 'Edit Task' and includes a 'General' tab. A 'Save' button is highlighted with a red box, and a red triangle is visible in the upper left corner of the yellow cell in the Resources table. The Resources table has the following data:

Resource	Employee	Associated Indirect Cost	Rate in \$	Quantity (Hrs)	Cost in \$
Construction Engineer - Hi	001-Alpha Con PL One		118.34	1,120	132,540.80
Construction Engineer - Mi	004-Alpha Con Engr One		86.57	100	8,657.00
Construction Engineer - Mi	005-Alpha Con Engr Two		86.57	50	4,328.50

Complete the rest of the task in the task list as above.

The screenshot shows the 'Direct Labor Cost' window in Masterworks. The left sidebar contains a navigation tree with 'Solicitation' selected. The main area is titled 'Direct Labor Cost' and includes a 'General' tab. The window shows a list of tasks with the following data:

Name	Order ID	Task Description	Sublet Status	Consultant/Subconsultant
Project Management	1			
Scope, Schedule and Change Management 1.1				
887 Manage Project Scope and Schem 1.1.1				
887.0 Manage Project Scope and Schem 1.1.1.1		Includes processes for establishing the policies, procedures, and documentation needed to plan, develop, manage, execute, and control the project schedule and scope.		The Alpha Corporation
Communication and Stakeholder Management 1.2				
893 Manage Project Communications 1.2.1				

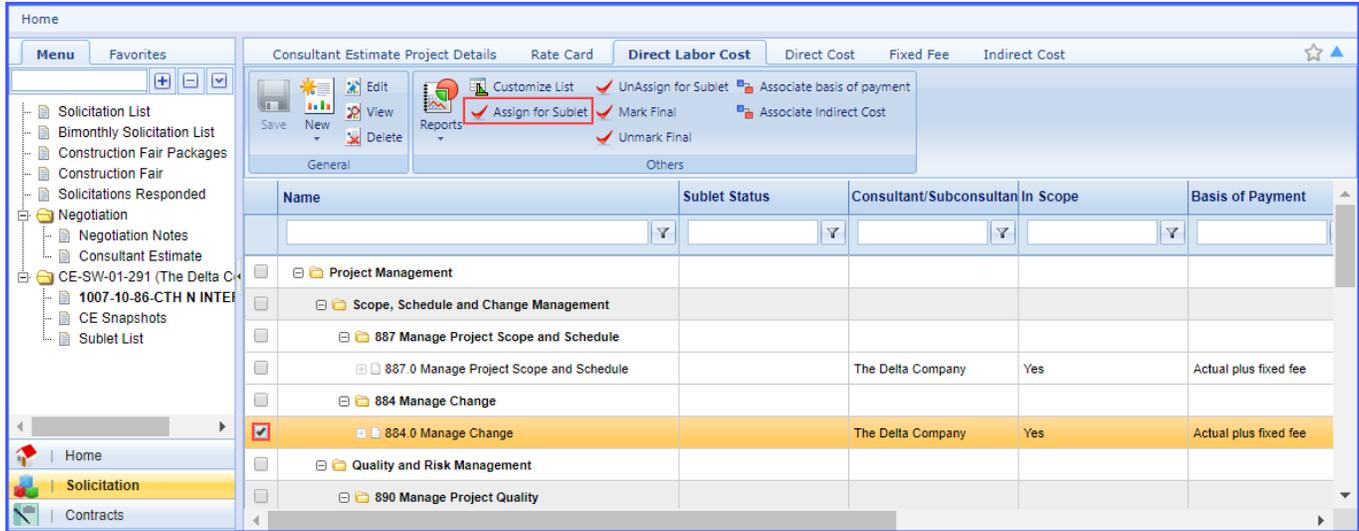
Total Hours : 13,470.00 Total Amount : \$ 1,107,023.40

Additional tasks may be added to the task list as outlined in section [Add a New Task](#) in this guide. Please discuss with your WisDOT contact before adding additional tasks.

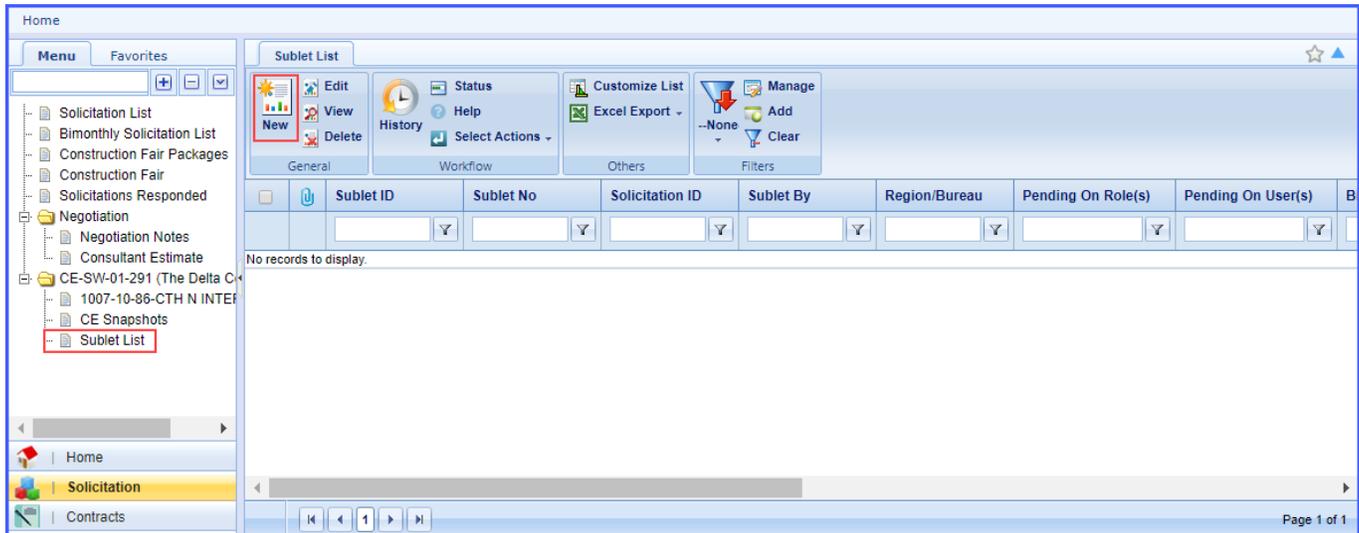
3.3.2 Creating a Sublet

A single task may not be performed by more than one consultant. If a task will be performed by more than one consultant add the same task to the task list twice. See [Add a New Task](#) in this guide.

To create a sublet check the box next to the task to be given to the subconsultant and click **Assign for Sublet**.



Click on Sublet List in the left navigation pane and click on **New**.



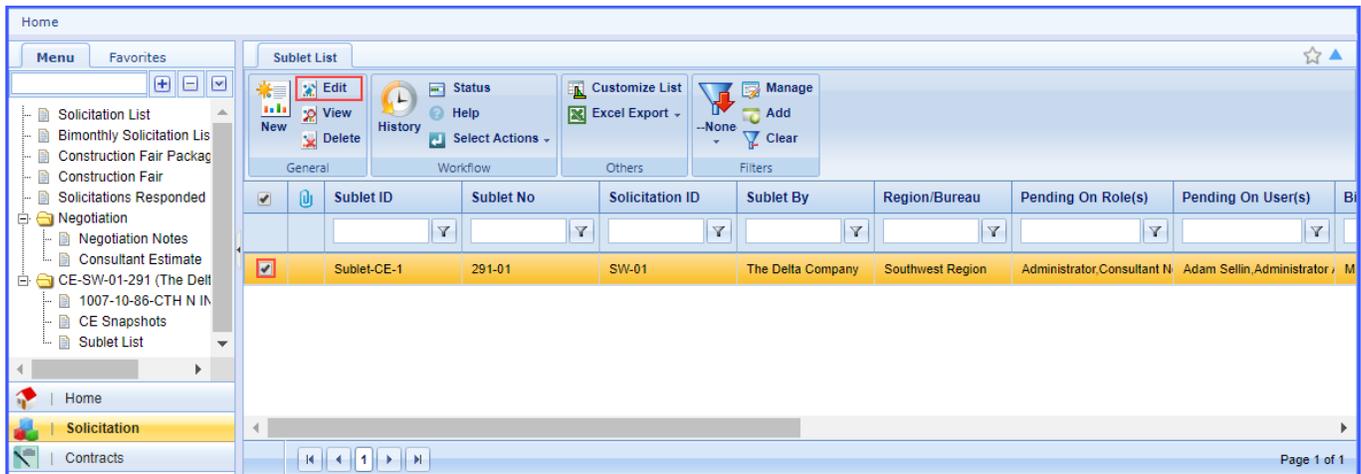
Enter the **Sublet No** as the negation number with a dash and sequence number (ex 291-01.) Use the ellipses to select **Sublet to Consultant**. Enter **Description** and **Scope of Work** narratives. Us the ellipses to select the **Contract Function** of the sublet. Click **Save**.

The screenshot shows a software interface for entering sublet details. On the left is a navigation tree with categories like Solicitation List, Negotiation, and CE-SW-01-291. The main area is titled 'Sublet Details' and contains the following fields:

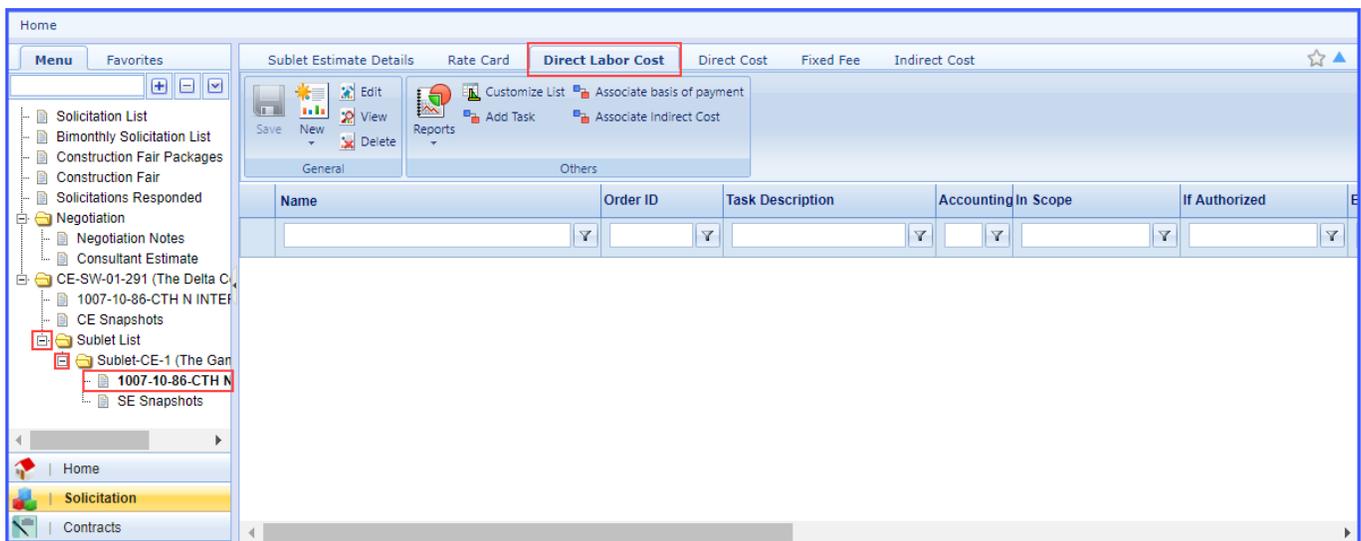
- Selection Type :** Solicitation
- Sublet ID :** <Auto Generated>
- Sublet No : *** 291-01
- Sublet By :** The Delta Company
- Sublet Date :** 10/15/2018 12:00 AM
- Sublet to Consultant : *** The Gamma Company
- Solicitation ID :** SW-01
- Fixed Fee % :** 7.50
- Description : *** Sublet to manage changes in the contract.
- Scope of work : *** The subconsultant will monitor changes as they arise
- Contract Function :** Construction Services

At the bottom, there is a section for 'Projects (In scope excluding If authorized)'. A toolbar at the top left includes 'Save', 'Cancel', 'History', and 'Scope Finalized' buttons. A 'Menu' sidebar on the left contains 'Home', 'Solicitation', and 'Contracts' options.

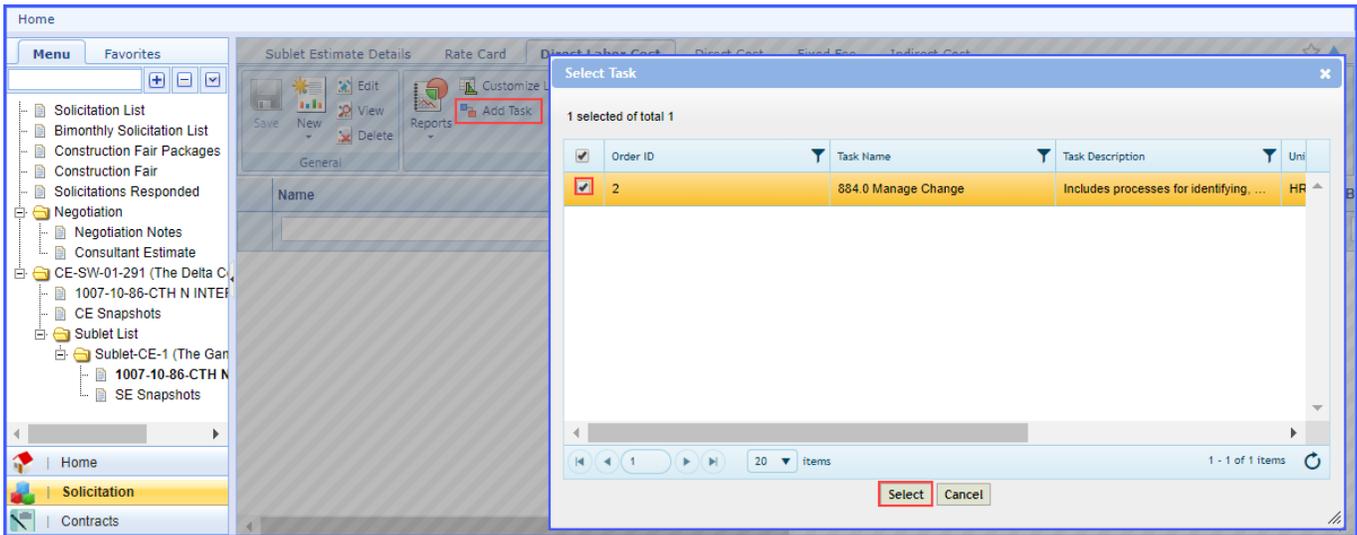
Check the box next to the newly created sublet and click **Edit**.



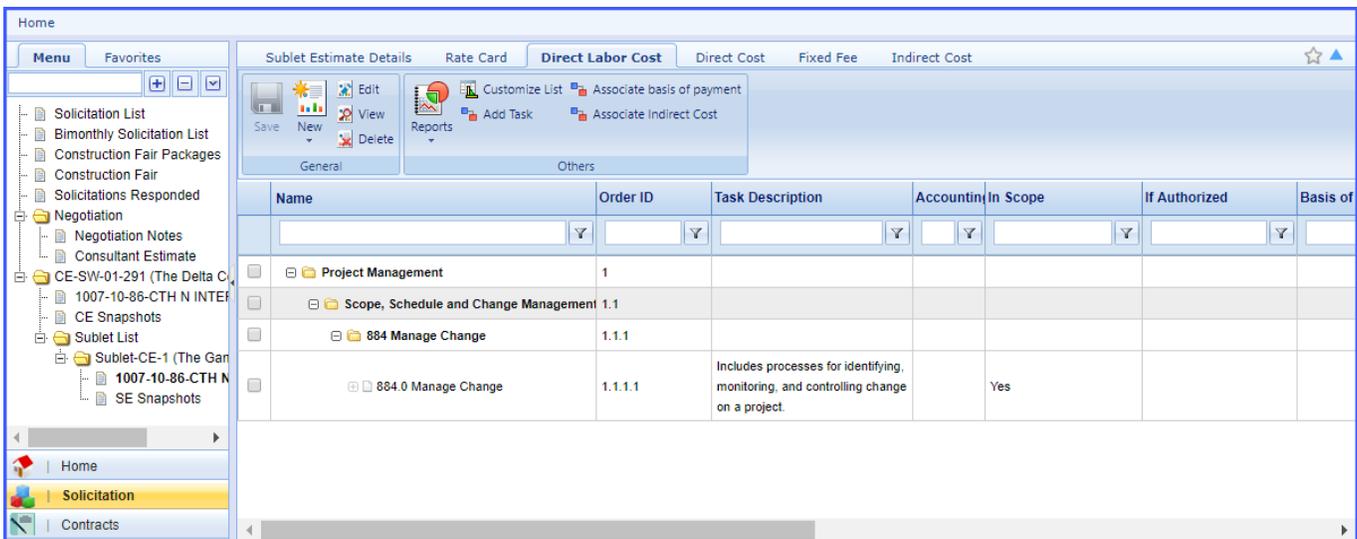
Expand the folder in the left navigation pane and click on the link with the project ID. Click on the **Direct Labor Cost** tab.



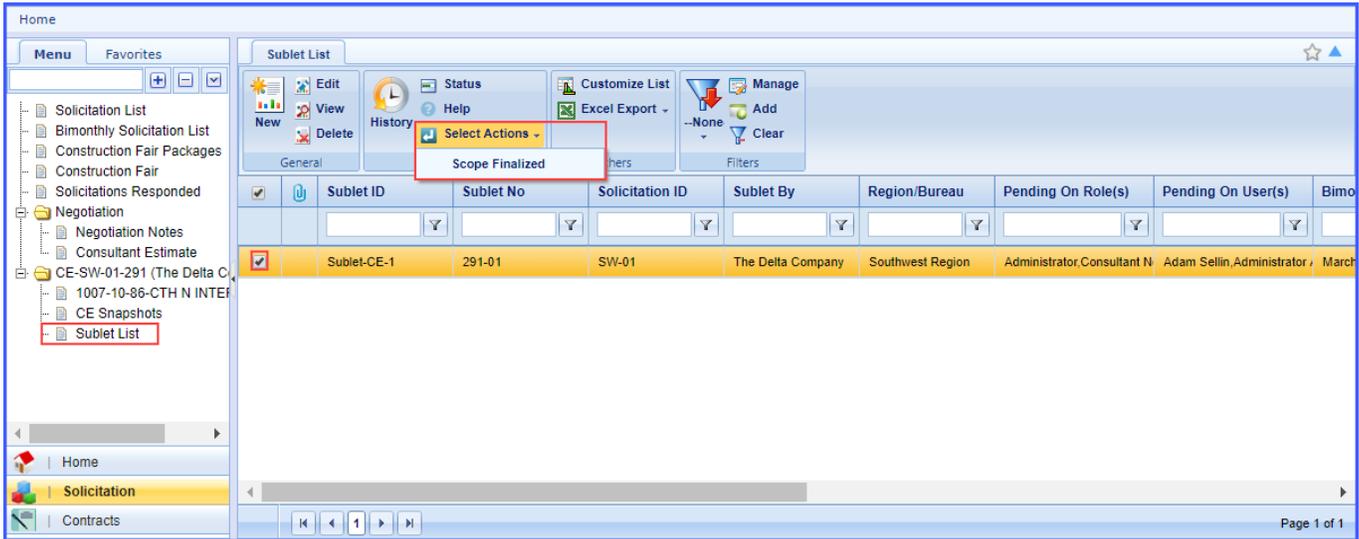
Click **Add Task**. In the pop-up box check the box next to the task to be assigned to the subconsultant and click **Select**.



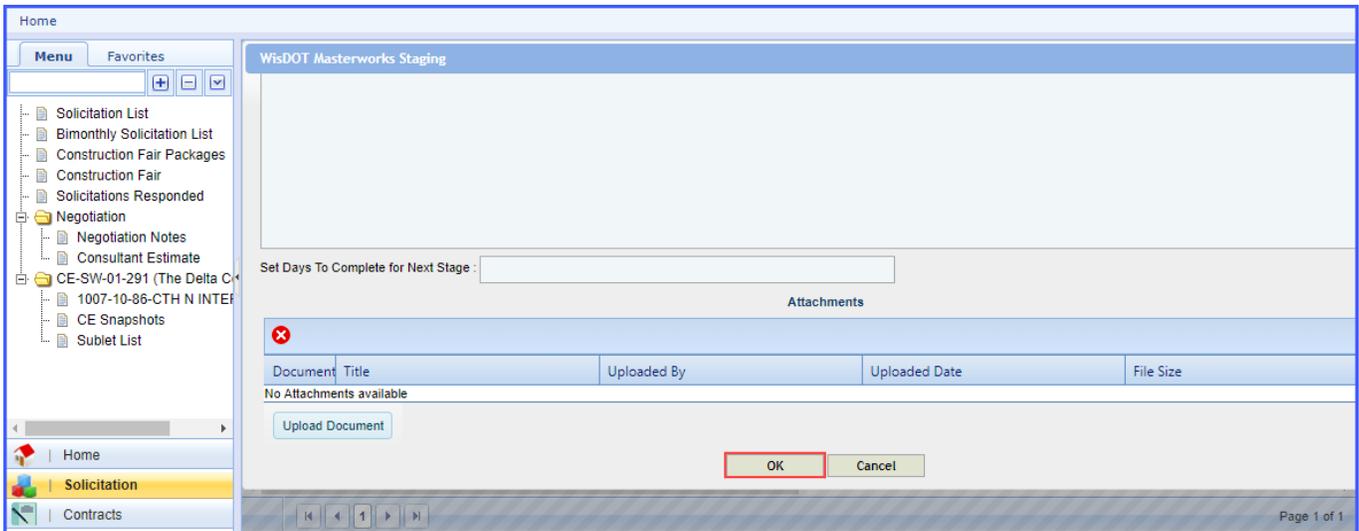
The task will now show up in the subconsultant's task list.



Click on **Sublet List** in the left navigation pane. Check the box next to the sublet. Click on **Select Actions** and **Scope Finalized**.



Click **OK** on the acknowledgement screen. The subconsultant can now begin work on its negotiation.



3.3.3 Completing Direct Labor Cost

Once all tasks have been completed click **Mark Final**.

A basis of payment must be associated to every task to complete this action.

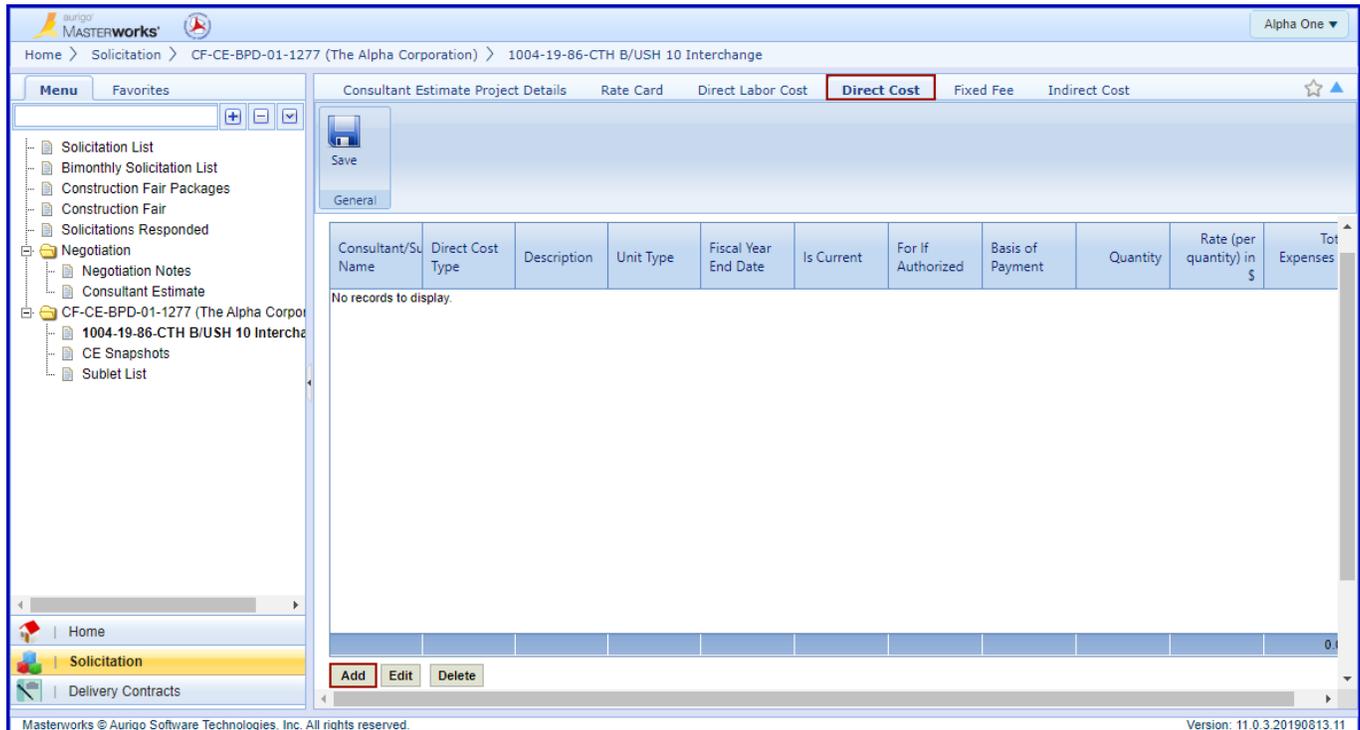
The screenshot shows the Masterworks software interface. The breadcrumb path is: Home > Solicitation > CF-CE-BPD-01-1277 (The Alpha Corporation) > 1004-19-86-CTH B/USH 10 Interchange. The 'Direct Labor Cost' tab is active. In the 'Others' section of the ribbon, the 'Mark Final' button is highlighted with a red box. The main table lists tasks under 'Project Management' and 'Scope, Schedule and Change Management'. The task '887.0 Manage Project Scope and Schedules' is expanded, showing a description: 'Includes processes for establishing the policies, procedures, and documentation needed to plan, develop, manage, execute, and control the project schedule and scope.' The consultant is listed as 'The Alpha Corporation'. At the bottom right, it shows 'Total Hours : 13,470.00 Total Amount : \$ 1,107,023.40'.

A success message will appear.

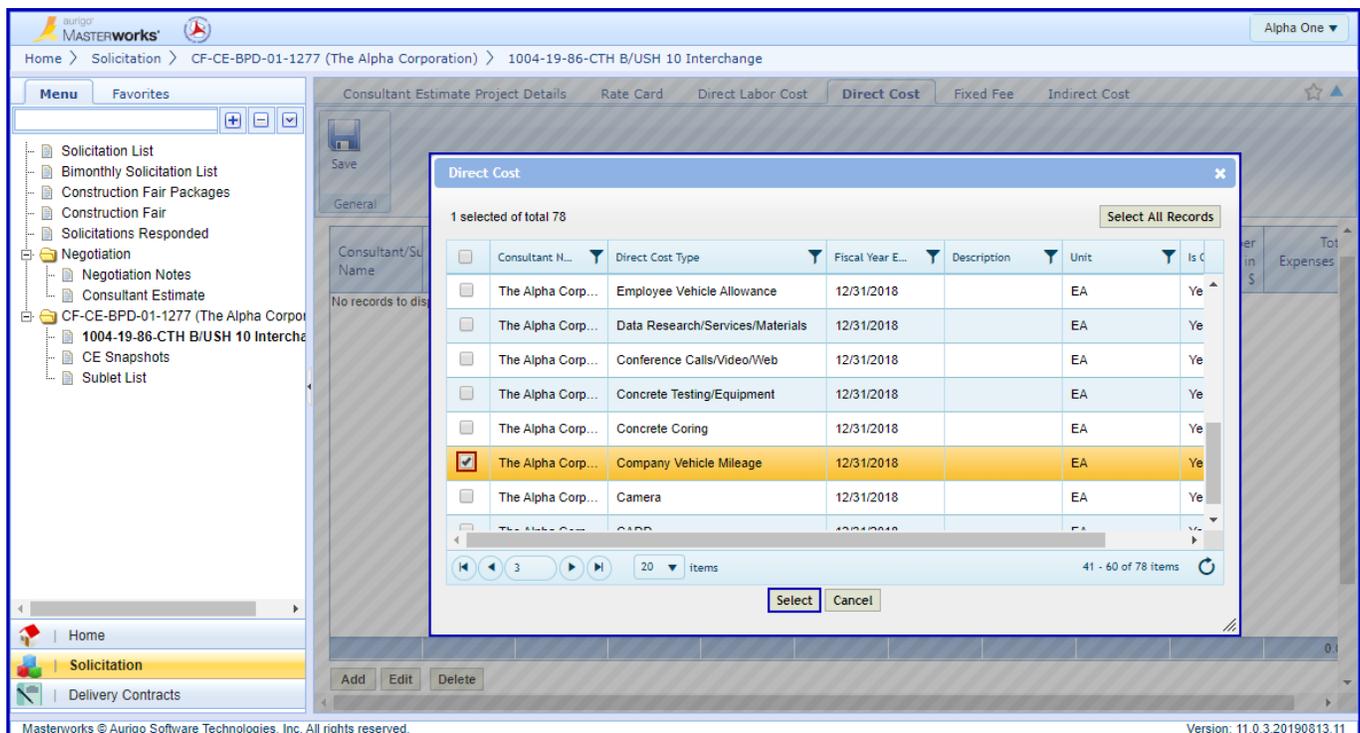
This screenshot is identical to the previous one, but a green success message box is overlaid on the top right of the ribbon area. The message reads: 'successfully Marked as final.' with a checkmark icon. The 'Mark Final' button in the ribbon is now greyed out, indicating the action has been completed.

3.4 Add Direct Costs

To add direct costs, click on the **Direct Cost** tab and click **Add** below the Direct Cost table.



In the pop-up box check the box(es) next to direct cost type(s) that will be part of the contract. Click **Select** to add the types to the table. Multiple types may be added at once. Direct cost types may be duplicated, for example meals for lunch and meals for dinner.



Click on one of the direct types so that it turns orange and click **Edit**.

Consultant/SU Name	Direct Cost Type	Description	Unit Type	Fiscal Year End Date	Is Current	For If Authorized	Basis of Payment	Quantity	Rate (per quantity) in \$	Tot Expenses
The Alpha Cor	Company Vehi		EA	12/31/2018	Yes	No	Specific Rate	75,000.00	0.545	40,875.0
The Alpha Cor	Meals		EA	12/31/2018	Yes	No		0.00	0	0.0
The Alpha Cor	Meals		EA	12/31/2018	Yes	No		0.00	0	0.0

Enter an additional **Description**. **For If Authorized** defaults to No, this should not be changed unless it will be part of a future contract authorization. Select a **Basis of Payment**. Enter the estimated **Quantity** of the item and the **Rate (per quantity)**. Click **Save**.

The basis of payment for direct costs should match the basis of payment for direct labor cost.

Edit Direct Cost

Description: Meals for lunch

Unit Type: EA

Fiscal Year End Date: 12/31/2018

Is Current: Yes

For If Authorized: No

Basis of Payment: Specific Rate

Quantity: 1,500.00

Rate (per quantity) in \$: 10.00

Total Expenses in \$: 15,000.00

Buttons: Save, Cancel

After all items have been completed click **Save**.

Save

Consultant/Su Name	Direct Cost Type	Description	Unit Type	Fiscal Year End Date	Is Current	For If Authorized	Basis of Payment	Quantity	Rate (per quantity) in \$	Tot Expenses
The Alpha Corp	Company Vehi		EA	12/31/2018	Yes	No	Specific Rate	75,000.00	0.545	40,875.1
The Alpha Corp	Meals	Meals for lunch	EA	12/31/2018	Yes	No	Specific Rate	1,500.00	10.00	15,000.1
The Alpha Corp	Meals	Meals for dinner	EA	12/31/2018	Yes	No	Specific Rate	500.00	20.00	10,000.1
										65,875.1

Add Edit Delete

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3.5 Fixed Fee

Click on the Fixed Fee tab to review the amount of fixed fee included in the contract. There is no user entry on this screen. For Specific Rate fixed fee is added to the labor rate; no fixed fee cost will display here.

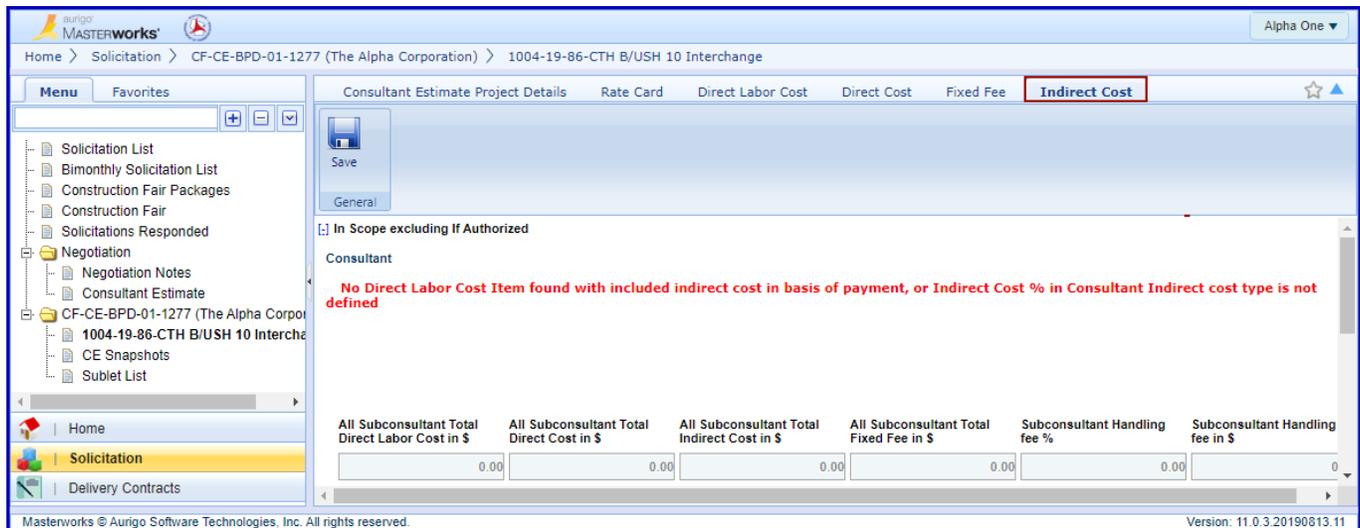
Fixed Fee

No Direct Labor Cost Item found with included fixed fee in basis of payment

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3.6 Indirect Cost

Click on the **Indirect Cost** tab to review the indirect cost added to the contract. For Specific Rate indirect cost is added to the labor rate; no indirect cost will display here.

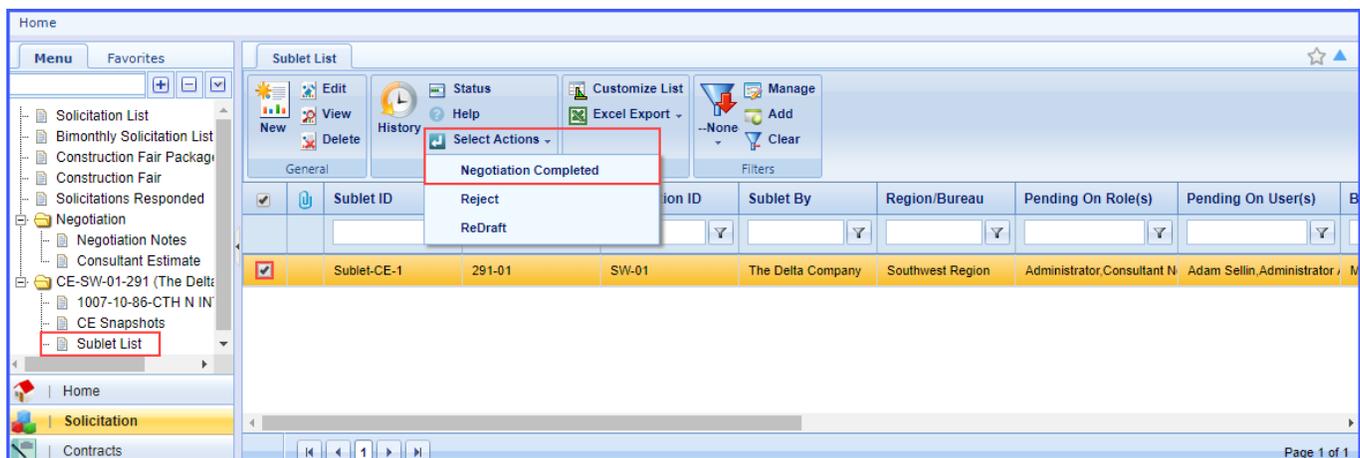


3.7 Publishing the Estimate

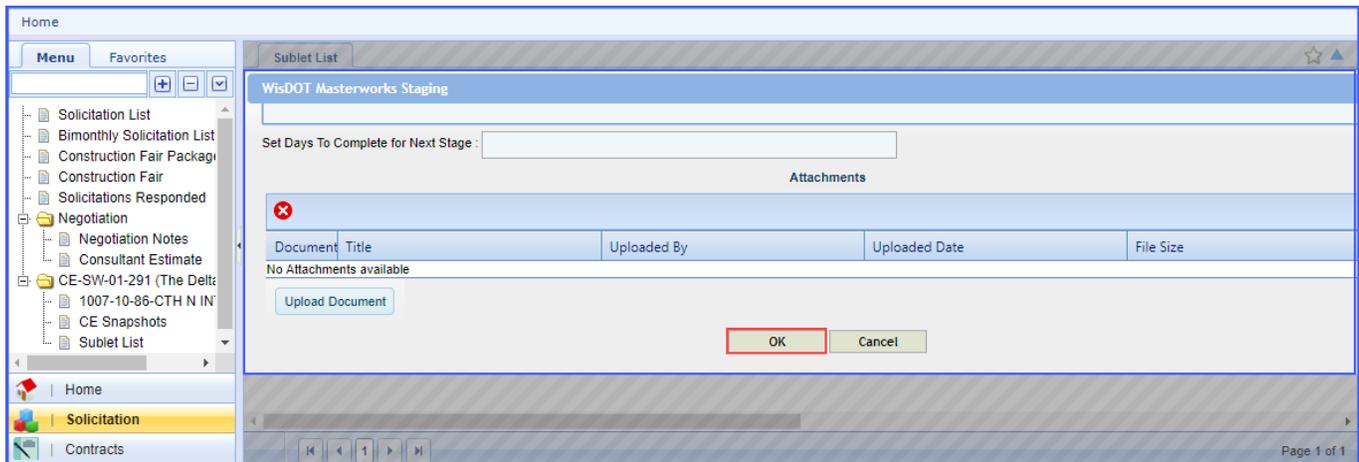
3.7.1 Accepting Subconsultant Negotiations

If any sublets have been made, the higher tier consultant must accept before the negotiation may be published back to WisDOT.

Click on **Sublet List** in the left navigation pane. Check the box next to the negotiation. Click on **Select Actions** and **Negotiation Completed** to accept the subconsultants estimate. If revisions are needed choose **ReDraft** and then click on **Select Actions** and **Scope Finalized**.

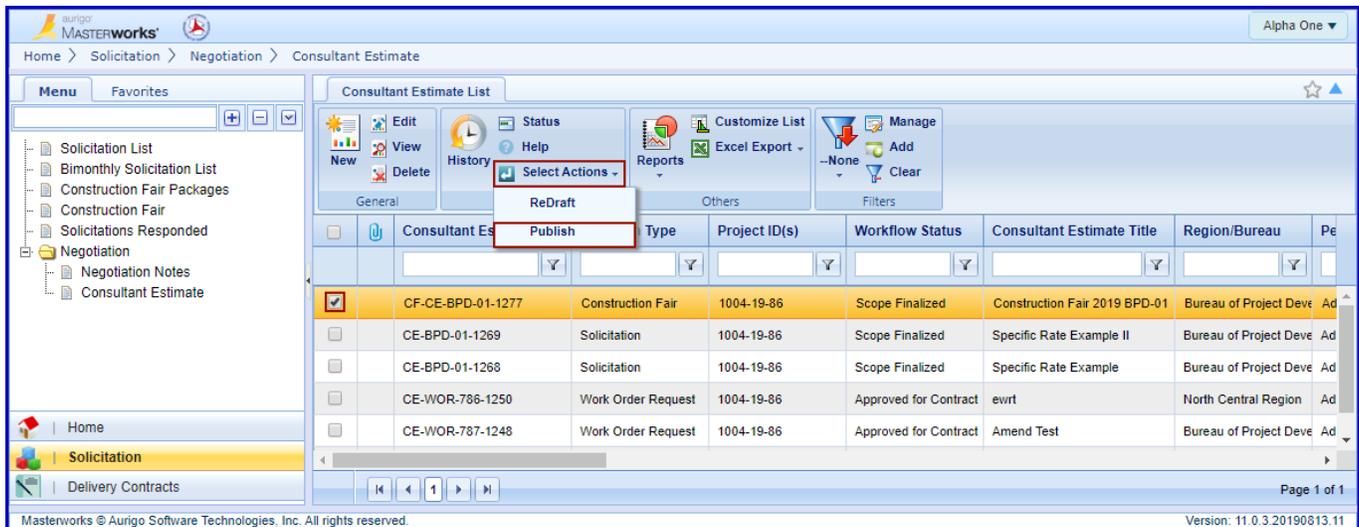


Click **OK** on acknowledgement screen.

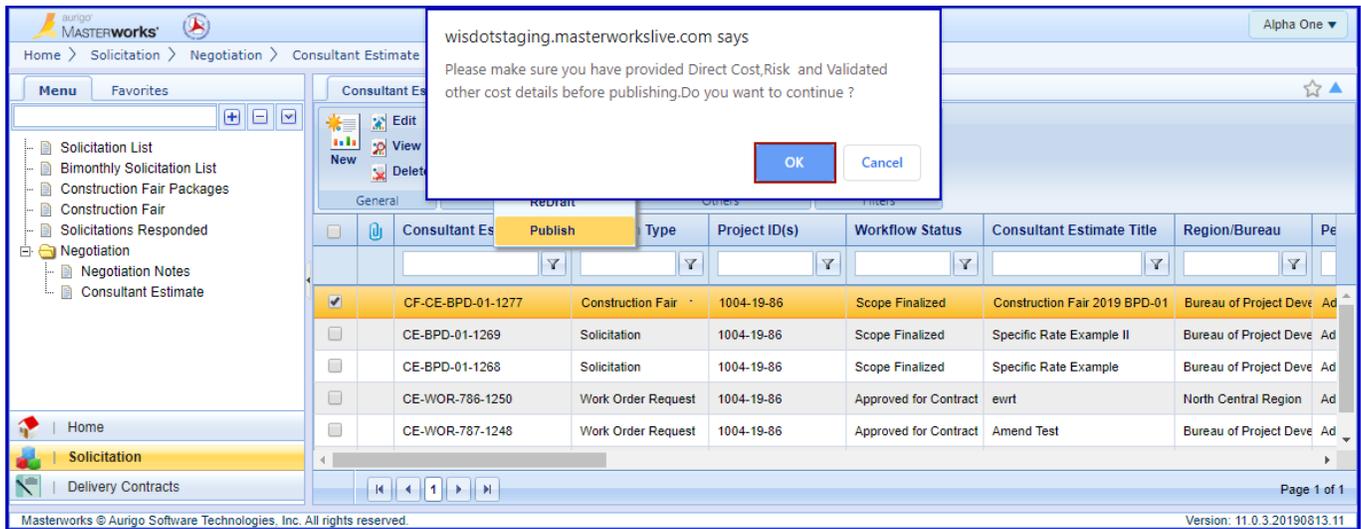


3.7.2 Publishing the Prime's Estimate

After reviewing project costs click on **Consultant Estimate** in the left navigation pane. Check the box next to the negotiation. Click **Select Actions** and then click **Publish**. This returns the negotiation to WisDOT and moves the process forward. Selecting ReDraft will return the negotiation to WisDOT for revisions.

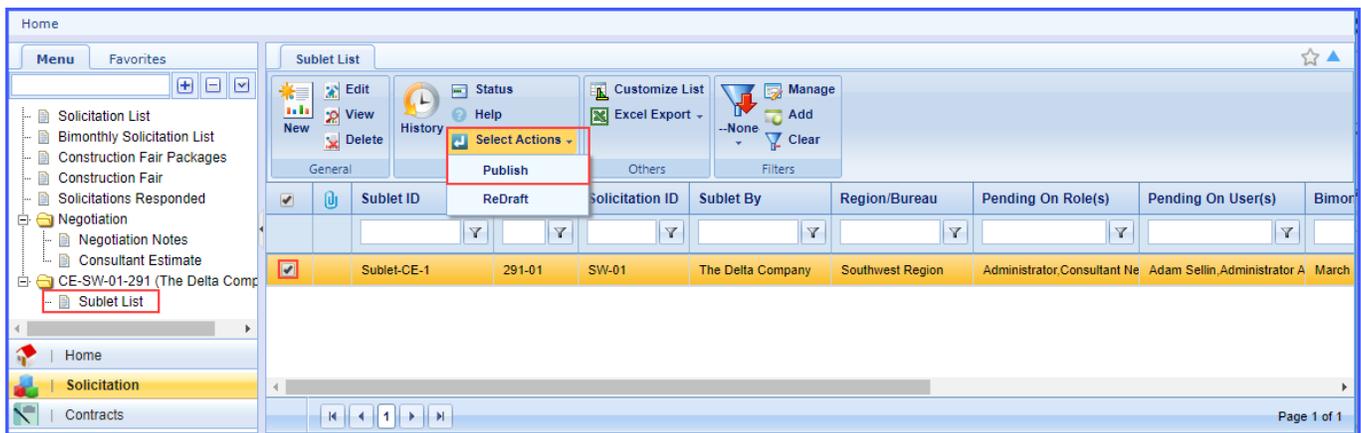


Click **OK** on the acknowledgement screen.

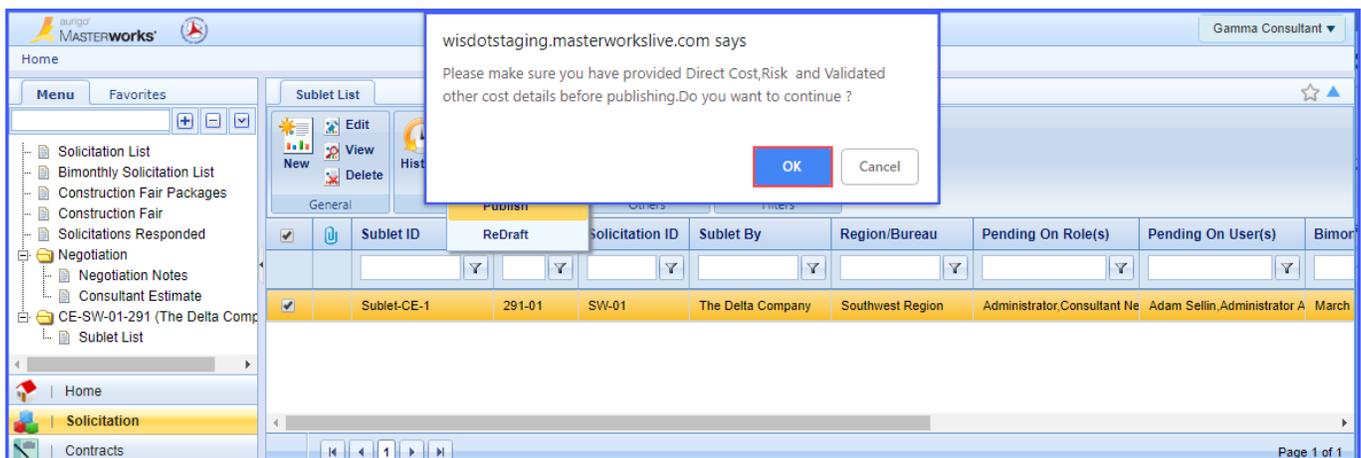


3.7.3 Publishing a Sublet

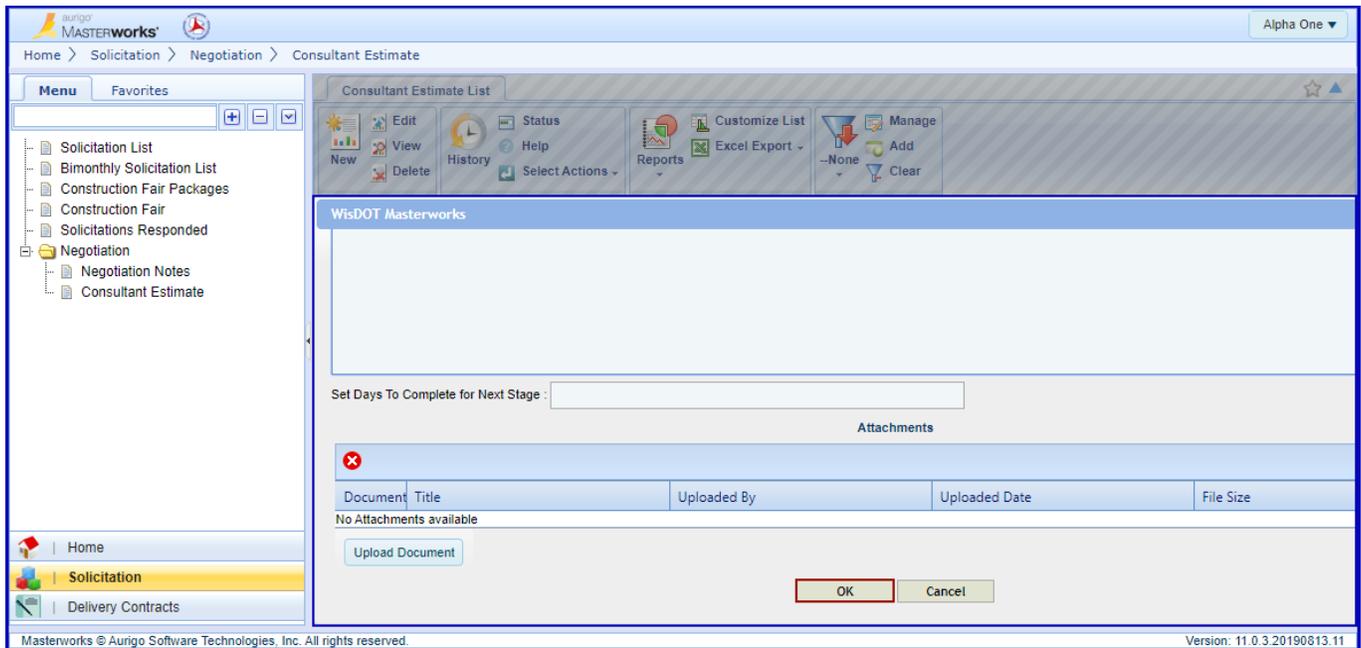
After reviewing project costs click on the **Sublet List** link in the left navigation pane. Check the box next to the negotiation. Click **Select Actions** and then click **Publish**.



Click **OK** on the warning message that appears



Click **OK** on the acknowledgement screen.



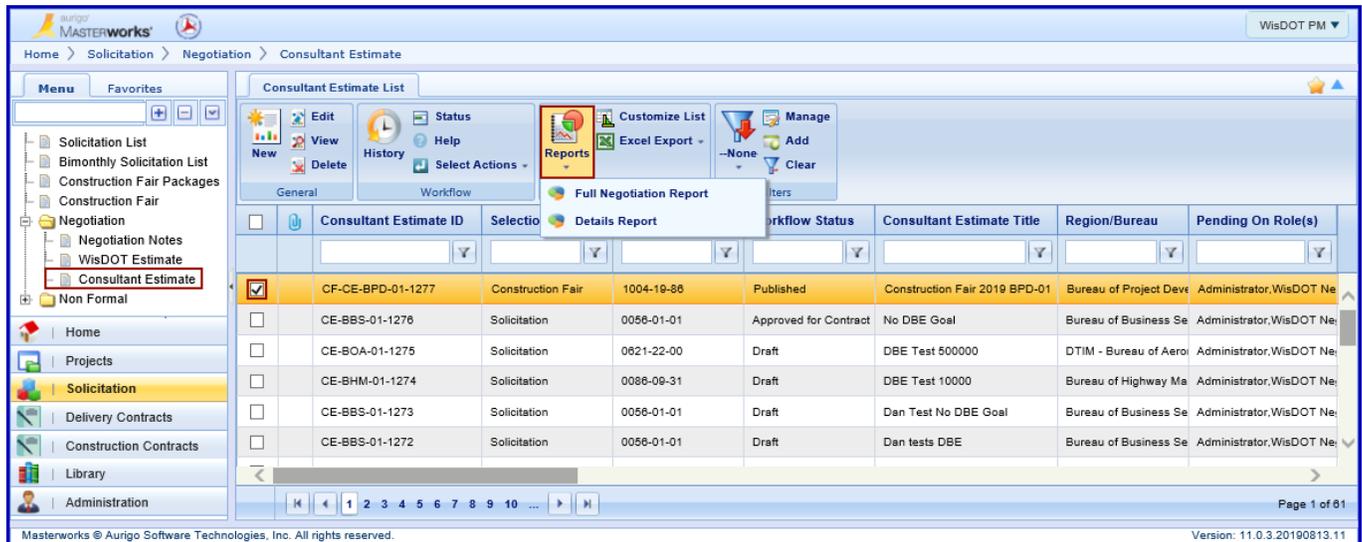
The negotiation has now been returned to WisDOT. Please let your WisDOT contact know the estimate is ready for review.

4 Review Estimate – WisDOT

After the consultant has published the estimate, WisDOT may begin its review.

4.1 Negotiation Reports

To view reports, navigate to the solicitation module. Click on Consultant Estimate. Check the box next to the negotiation. Click on the Reports button and select one of the reports from the menu.



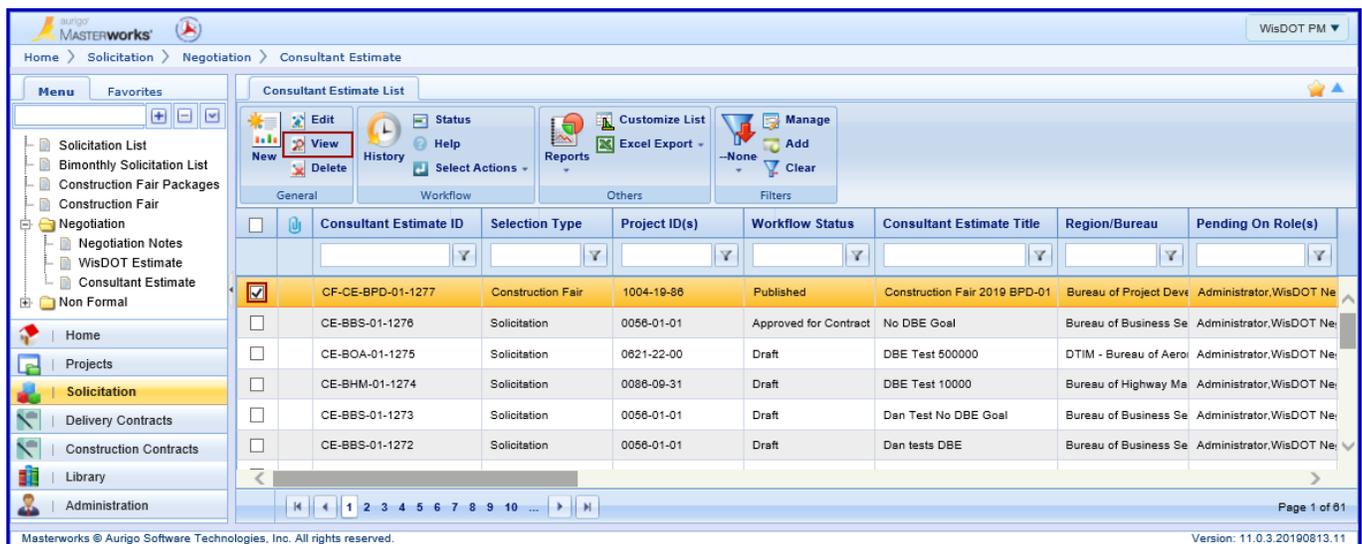
The screenshot shows the Masterworks software interface. The left navigation pane is expanded to 'Solicitation' and then 'Consultant Estimate'. The main window displays a table of Consultant Estimate List. The 'Reports' button is highlighted, and a dropdown menu is open showing 'Full Negotiation Report' and 'Details Report'.

	Consultant Estimate ID	Selection	Project ID(s)	Workflow Status	Consultant Estimate Title	Region/Bureau	Pending On Role(s)
<input checked="" type="checkbox"/>	CF-CE-BPD-01-1277	Construction Fair	1004-19-86	Published	Construction Fair 2019 BPD-01	Bureau of Project Dev	Administrator, WisDOT Ne
<input type="checkbox"/>	CE-BBS-01-1276	Solicitation	0056-01-01	Approved for Contract	No DBE Goal	Bureau of Business Se	Administrator, WisDOT Ne
<input type="checkbox"/>	CE-BOA-01-1275	Solicitation	0821-22-00	Draft	DBE Test 500000	DTIM - Bureau of Aero	Administrator, WisDOT Ne
<input type="checkbox"/>	CE-BHM-01-1274	Solicitation	0086-09-31	Draft	DBE Test 10000	Bureau of Highway Ma	Administrator, WisDOT Ne
<input type="checkbox"/>	CE-BBS-01-1273	Solicitation	0056-01-01	Draft	Dan Test No DBE Goal	Bureau of Business Se	Administrator, WisDOT Ne
<input type="checkbox"/>	CE-BBS-01-1272	Solicitation	0056-01-01	Draft	Dan tests DBE	Bureau of Business Se	Administrator, WisDOT Ne

- The Full Negotiation Report contains all negotiation information.
- The Details Report contains a summary of prime consultant costs.

4.2 Reviewing Estimate Costs

Navigate to the **Solicitation** module, expand the **Negotiation** folder in the left navigation and clicking **Consultant Estimate**. Check the box next to the negotiation and click **View**.



The screenshot shows the Masterworks software interface. The left navigation pane is expanded to 'Solicitation' and then 'Consultant Estimate'. The main window displays a table of Consultant Estimate List. The 'View' button is highlighted.

	Consultant Estimate ID	Selection Type	Project ID(s)	Workflow Status	Consultant Estimate Title	Region/Bureau	Pending On Role(s)
<input checked="" type="checkbox"/>	CF-CE-BPD-01-1277	Construction Fair	1004-19-86	Published	Construction Fair 2019 BPD-01	Bureau of Project Dev	Administrator, WisDOT Ne
<input type="checkbox"/>	CE-BBS-01-1276	Solicitation	0056-01-01	Approved for Contract	No DBE Goal	Bureau of Business Se	Administrator, WisDOT Ne
<input type="checkbox"/>	CE-BOA-01-1275	Solicitation	0821-22-00	Draft	DBE Test 500000	DTIM - Bureau of Aero	Administrator, WisDOT Ne
<input type="checkbox"/>	CE-BHM-01-1274	Solicitation	0086-09-31	Draft	DBE Test 10000	Bureau of Highway Ma	Administrator, WisDOT Ne
<input type="checkbox"/>	CE-BBS-01-1273	Solicitation	0056-01-01	Draft	Dan Test No DBE Goal	Bureau of Business Se	Administrator, WisDOT Ne
<input type="checkbox"/>	CE-BBS-01-1272	Solicitation	0056-01-01	Draft	Dan tests DBE	Bureau of Business Se	Administrator, WisDOT Ne

A summary of costs is displayed. The total cost now includes the cost of subconsultants.

Consultant Estimate Details

Consultant Estimate ID : CF-CE-BPD-01-1277 Consultant Estimate Title : Construction Fair 2019 BPD-01

Selection Type : Construction Fair

Construction Fair Title : August 2019

Construction Fair Month/Year : August 2019

Construction Fair Package ID : BPD-01

Construction Fair Number : 1908

Region/Bureau : Bureau of Project Development

Fixed Fee % : 7.25

Selected Prime Consultant : The Alpha Corporation

Negotiation Submission Due Date : 10/21/2019

Is DBE : No

Import Task List from : Construction Fair Package

Contract Function : Construction Services

Total Estimate Amount in \$: 1,172,898.40

Projects (In scope excluding If authorized)

Project ID	Project Name	Direct Labor Cost in \$	Direct Cost in \$	Indirect Cost in \$	Fixed Fee in \$	Total in \$	Total Hours	Marked as Final	Limit	Sublet
1004-19-88	Amherst -	1,107,023.40	65,875.00	0.00	0.00	1,172,898.40	13,470.00	Yes	CTH B/USH	No

To view more detailed information, expand the folder in the left navigation and click on the link with the project ID. Click through the tabs on the top of the screen to see more details.

Consultant Estimate Project Details

Cost Summary (In scope excluding If authorized)

Cost Type	Amount in \$
Direct Labor Cost	1,107,023.40
Direct Cost	65,875.00
Fixed Fee	0.00
Indirect Cost	0.00
Estimate Total in \$:	1,172,898.40
Estimate Total Hours:	13,470.00

Cost Summary (If authorized)

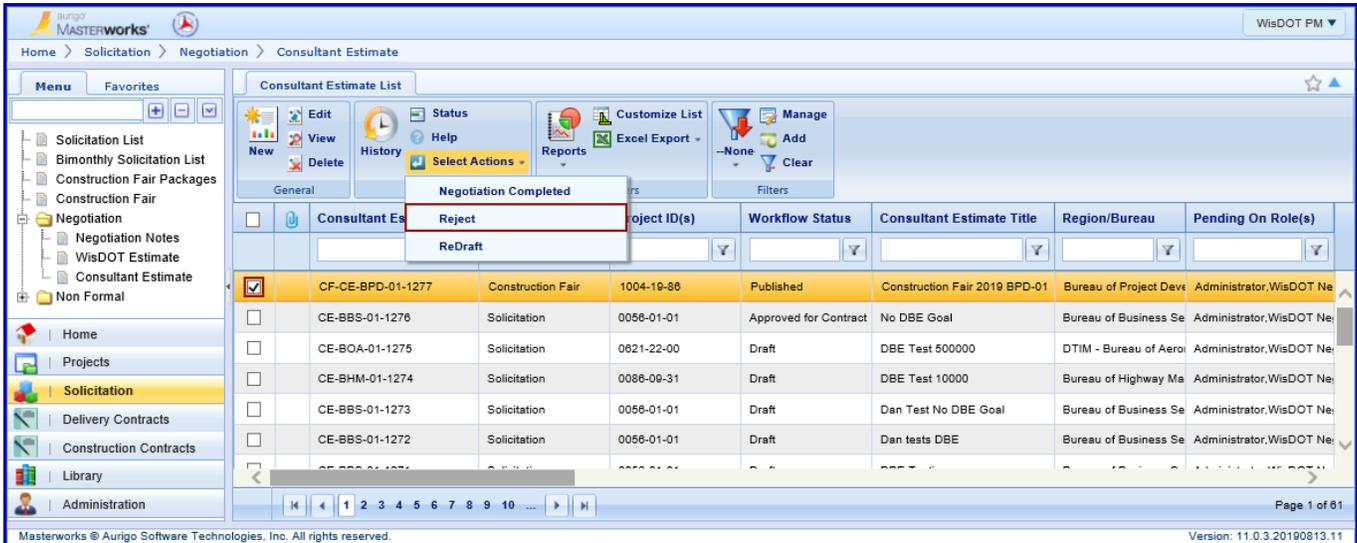
Cost Type	Amount in \$
Direct Labor Cost	0.00
Direct Cost	0.00
Fixed Fee	0.00
Indirect Cost	0.00
Estimate Total Auth in \$:	0.00
Estimate Total Auth Hours:	0.00

Attachments

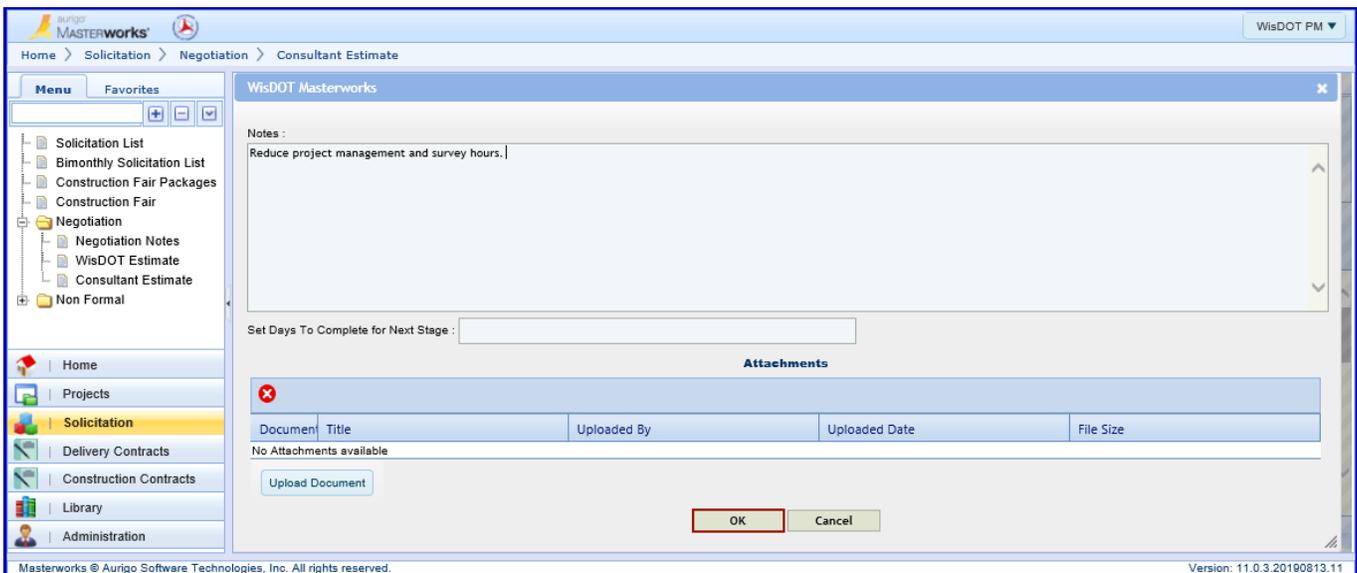
Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size
No Attachments available					

4.3 Returning the Negotiation for Revision

If the consultant needs to make changes to the estimate navigate to the Consultant Estimate list page. Check the box next to the negotiation and click **Select Actions** and **Reject**.



Enter a short comment in the Notes section of the acknowledgement screen to indicate changes that need to be made. More detailed discussions may occur outside of Masterworks. Click **OK** on the acknowledgement screen.



The negotiation has now been returned to the consultant for revisions. Contact the consultant to discuss changes.

The screenshot displays the Masterworks software interface for a Consultant Estimate List. The interface includes a navigation menu on the left, a toolbar with various actions like Edit, View, Delete, and Status, and a main table of estimates. The table has the following columns: Consultant Estimate ID, Selection Type, Project ID(s), Workflow Status, Consultant Estimate Title, Region/Bureau, and Pending On Role(s). The 'Workflow Status' column for the first row is highlighted in red and contains the text 'Scope Finalized'.

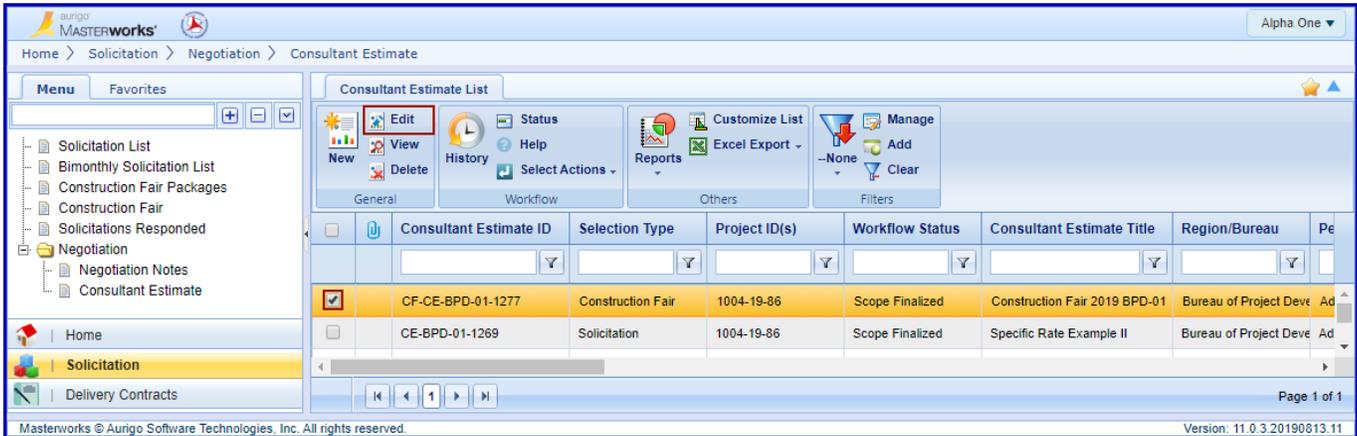
Consultant Estimate ID	Selection Type	Project ID(s)	Workflow Status	Consultant Estimate Title	Region/Bureau	Pending On Role(s)
CF-CE-BPD-01-1277	Construction Fair	1004-19-86	Scope Finalized	Construction Fair 2019 BPD-01	Bureau of Project Deve	Administrator, Consultant h
CE-BBS-01-1276	Solicitation	0056-01-01	Approved for Contract	No DBE Goal	Bureau of Business Se	Administrator, WisDOT Ne
CE-BOA-01-1275	Solicitation	0621-22-00	Draft	DBE Test 500000	DTIM - Bureau of Aero	Administrator, WisDOT Ne
CE-BHM-01-1274	Solicitation	0086-09-31	Draft	DBE Test 10000	Bureau of Highway Ma	Administrator, WisDOT Ne
CE-BBS-01-1273	Solicitation	0056-01-01	Draft	Dan Test No DBE Goal	Bureau of Business Se	Administrator, WisDOT Ne
CE-BBS-01-1272	Solicitation	0056-01-01	Draft	Dan tests DBE	Bureau of Business Se	Administrator, WisDOT Ne
CE-BBS-01-1271	Solicitation	0056-01-01	Draft	DBE Testing	Bureau of Business Se	Administrator, WisDOT Ne

Page 1 of 61

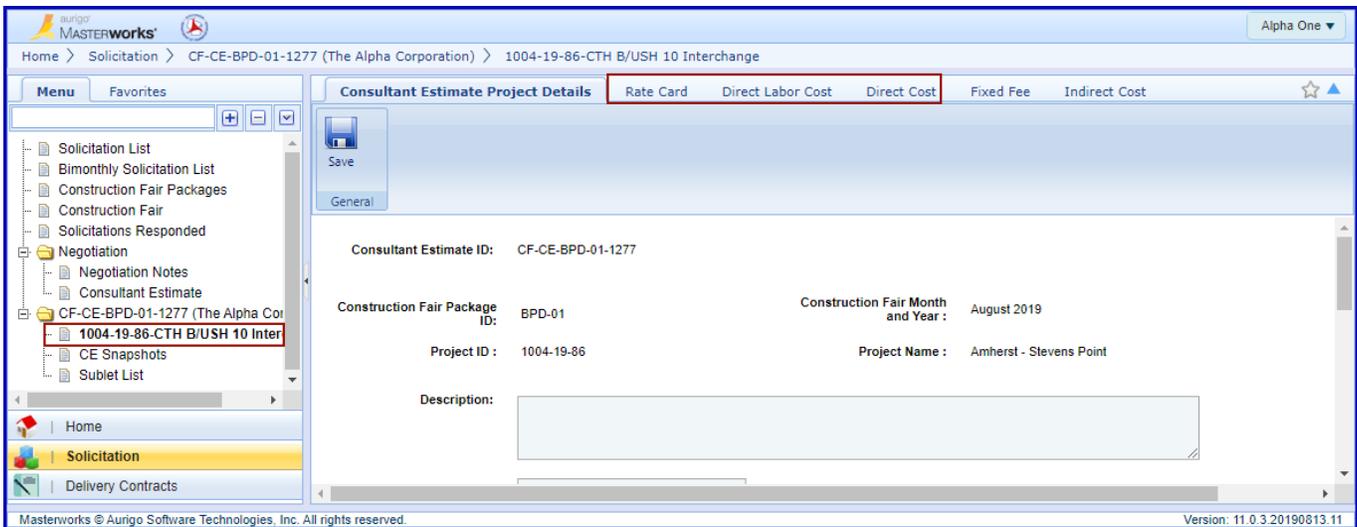
Masterworks © Aurigo Software Technologies, Inc. All rights reserved. Version: 11.0.3.20190813.11

5 Revising the Estimate – Consultant

To begin revising the estimate check the box next to the negotiation and click **Edit**.



Change may now be made to the Rated Cards, Direct Labor Cost and Direct Cost. Revise the Estimate using the steps outlined in Section 3: Consultant Estimate – Consultant



If the Rate Card(s) need to be modified select and Unmark as Final to edit. Mark as Final when edits are complete.

The screenshot shows the 'Rate Card' tab in the Masterworks application. The 'Unmark as Final' button is highlighted in red. Below the toolbar is a table with the following data:

Resource Classification	Final Labor Rate in \$	Rate Card type	Rate Card Status	Key Staff
<input checked="" type="checkbox"/> 2 Construction Technician - Mid	83.35	Specific	Final	Employee name
<input type="checkbox"/> 2 Survey Specialist/Professional -	114.37	Specific	Final	Employee name
<input type="checkbox"/> Survey Specialist/Professional - M	76.25	Specific	Final	Employee name
<input type="checkbox"/> Construction Technician - Mid	68.19	Specific	Final	Employee name
<input type="checkbox"/> Construction Specialist/Professio	75.24	Specific	Final	Employee name
<input type="checkbox"/> Construction Engineer - Mid	86.57	Specific	Final	Employee name

If the Direct Labor Cost needs to be revised, click Unmark Final before making changes.

The screenshot shows the 'Direct Labor Cost' tab in the Masterworks application. The 'Unmark Final' button is highlighted in red. Below the toolbar is a table with the following data:

Name	Order ID	Task Description	Sublet Status	Consultant/Subconsultant
<input type="checkbox"/> Project Management	1			
<input type="checkbox"/> Scope, Schedule and Change Management 1.1				
<input type="checkbox"/> 887 Manage Project Scope and Schedu 1.1.1		Includes processes for establishing the policies, procedures, and documentation needed to plan		

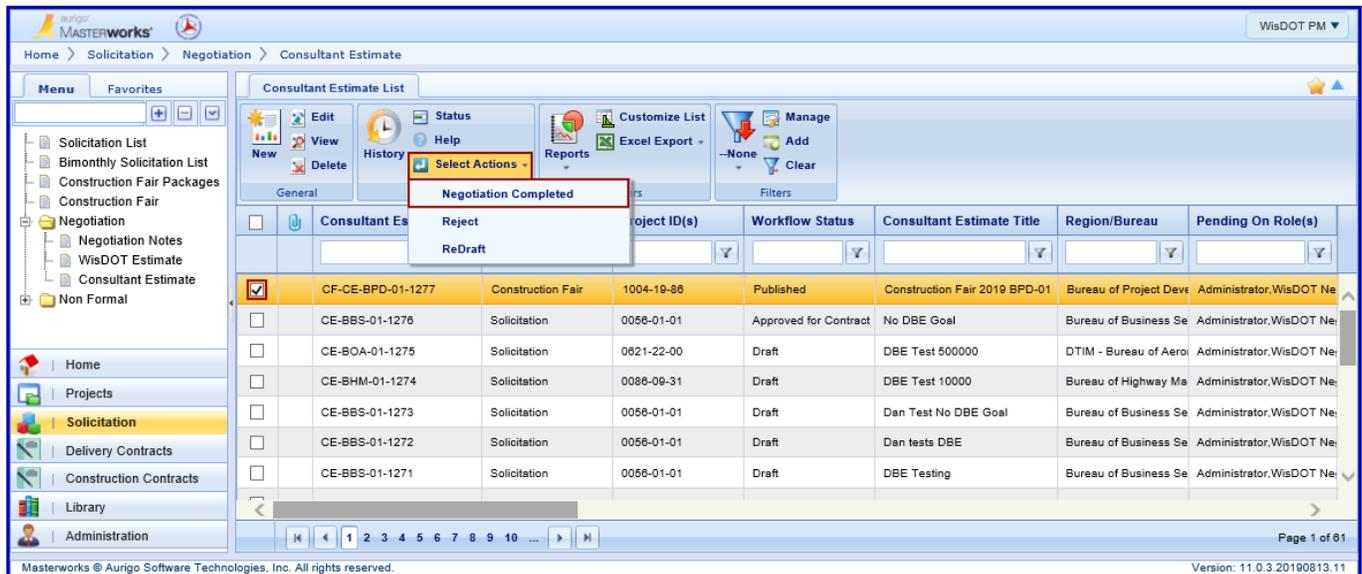
Total Hours : 13,470.00 Total Amount : \$ 1,107,023.40

Publish back to WisDOT as previously outlined.

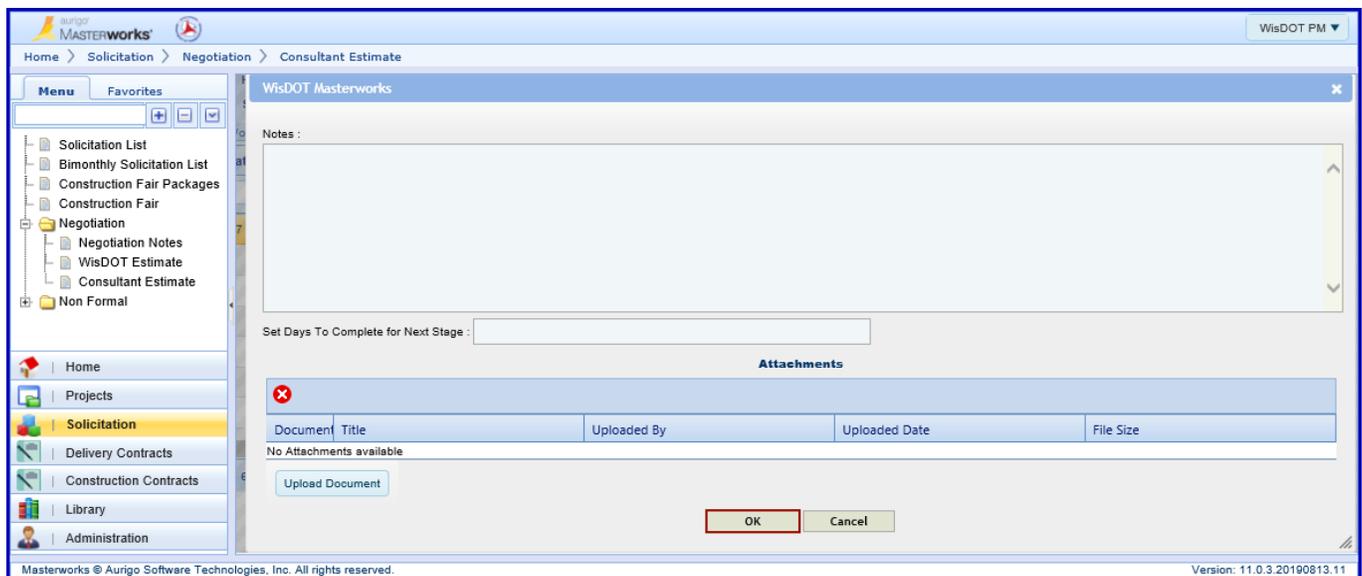
6 Complete Negotiation – WisDOT

After the final price has been agreed to the negotiation needs to be completed.

From the Consultant Estimate list page use the checkbox to select the negotiation. Click on **Select Actions** and **Negotiation Completed**.



Click **OK** on the acknowledgement screen.



From the **Consultant Estimate** list page use the checkbox to select the negotiation. Click on **Select Actions** and **Approved for Contract**.

The screenshot shows the 'Consultant Estimate List' interface. A table lists several estimates. The first row, 'CF-CE-BPD-01-1277', is selected. A context menu is open over this row, with 'Approved for Contract' highlighted. Other options include 'Reject' and 'ReDraft'.

	Project ID(s)	Workflow Status	Consultant Estimate Title	Region/Bureau	Pending On Role(s)
<input checked="" type="checkbox"/>	1004-19-86	Negotiation Completed	Construction Fair 2019 BPD-01	Bureau of Project Deve	Administrator,WisDOT Ne
<input type="checkbox"/>	0056-01-01	Approved for Contract	No DBE Goal	Bureau of Business Se	Administrator,WisDOT Ne
<input type="checkbox"/>	0621-22-00	Draft	DBE Test 500000	DTIM - Bureau of Aero	Administrator,WisDOT Ne
<input type="checkbox"/>	0088-09-31	Draft	DBE Test 10000	Bureau of Highway Ma	Administrator,WisDOT Ne
<input type="checkbox"/>	0056-01-01	Draft	Dan Test No DBE Goal	Bureau of Business Se	Administrator,WisDOT Ne
<input type="checkbox"/>	0056-01-01	Draft	Dan tests DBE	Bureau of Business Se	Administrator,WisDOT Ne
<input type="checkbox"/>	0056-01-01	Draft	DBE Testing	Bureau of Business Se	Administrator,WisDOT Ne

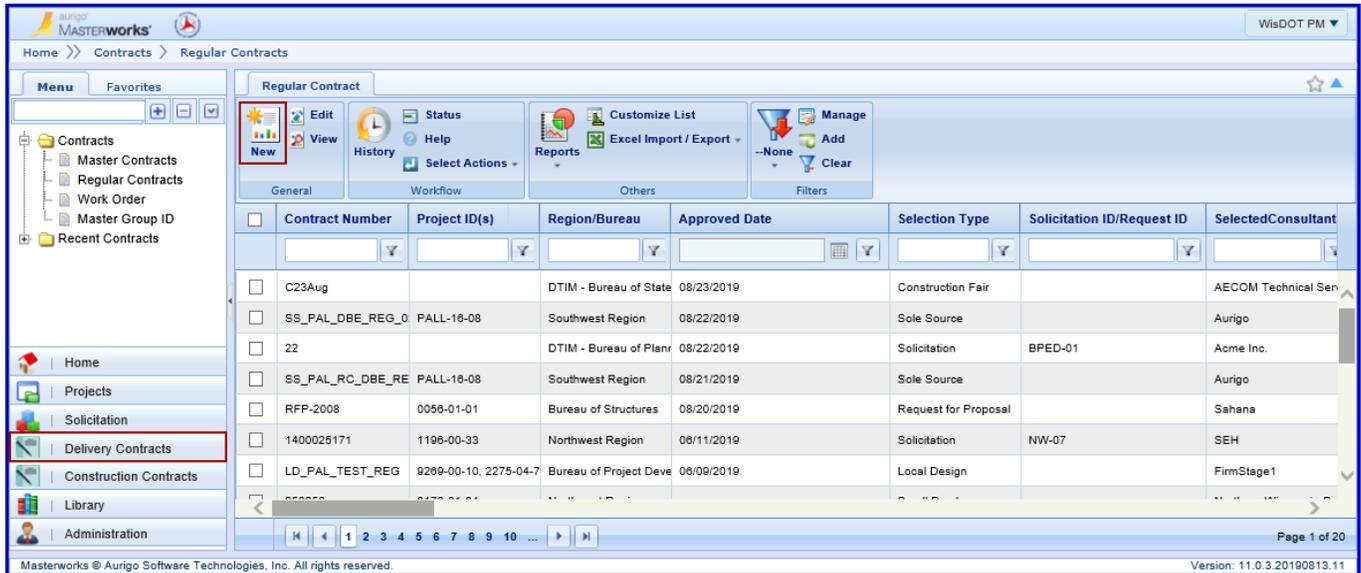
Click **OK** on the acknowledgement screen.

The screenshot shows the acknowledgement screen. It includes a 'Notes' field, a 'Set Days To Complete for Next Stage' input, and an 'Attachments' section. The attachments table is currently empty, showing 'No Attachments available'. 'OK' and 'Cancel' buttons are visible at the bottom.

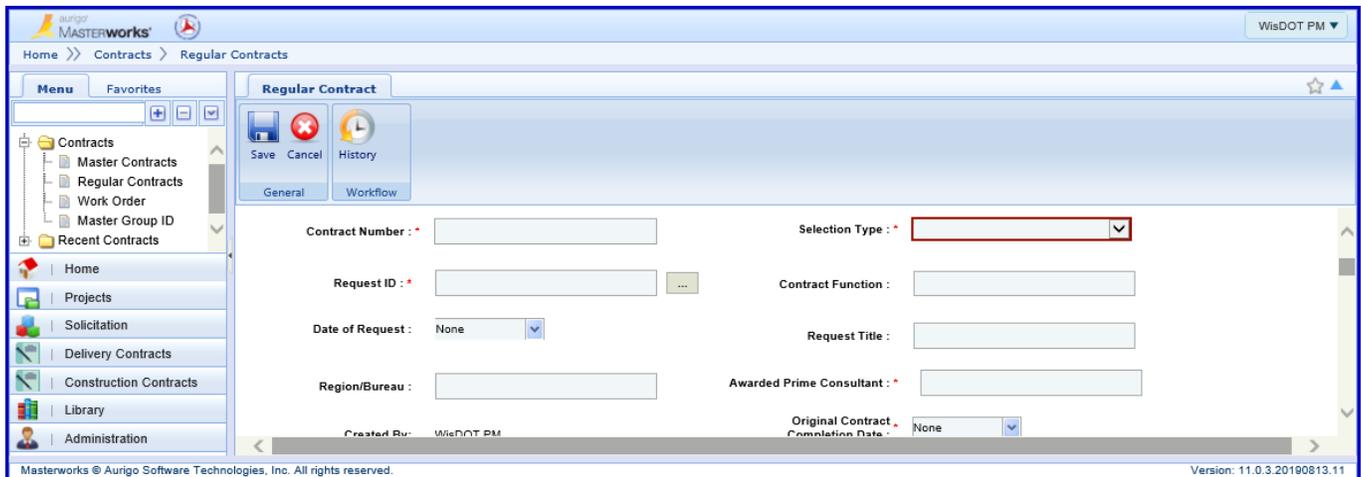
Document	Title	Uploaded By	Uploaded Date	File Size
No Attachments available				

7 Create a Contract - WisDOT

To create a new contract, click on the Delivery Contracts module. Expand the Contracts folder in the left navigation pane and click on the type of contract to be created. Master Contracts are created only by Central Office. Regular Contracts include contracts from bimonthly solicitations, construction fair, small purchase and sole source. Click on the **New** button.



Choose the **Selection Type**.



Fill in the fields with the required information. Enter the **Contract Number** from CARS. Use the ellipses to select the **Construction Fair Title**. Use the ellipses to select the Construction **Fair Package ID**. Use the ellipses to select the **Awarded Prime Consultant**. Add the **Original Contract Completion Date**. Select Regular as the **Type of Contract**. Add the Account Code to the projects table.

Regular Contract

CONTRACT BETWEEN
THE WISCONSIN DEPARTMENT OF TRANSPORTATION
AND AWARDED CONSULTANT FOR

Contract Number : * 14000007893 Selection Type : * Construction Fair

Construction Fair Title : * August 2019 Contract Function : Construction Services

Construction Fair Number : 1908 Construction Fair Month and Year : August 2019

Region/Bureau : Bureau of Project Development Construction Fair Package ID : * BPD-01

Consultant Estimate ID : * CF-CE-BPD-01-1277 Awarded Prime Consultant : * The Alpha Corporation

Created By : WisDOT PM Original Contract Completion Date : * 08/30/2021

Last Updated By : Type of Contract : * Regular

Created Date : 10/28/2019

Last Update Date : 10/28/2019

Projects

Project ID	Project Description	Project Limits	Route	County	Account Code	Contract Amount for Project in \$
1004-19-86	Amherst - Stevens Point	CTH B/USH 10 Interchar	USH 10	PORTAGE COUNTY	8700128	1,172,888.40

Edit

Description of Services :

Masterworks © Aurigo Software Technologies, Inc. All rights reserved. Version: 11.0.3.20190813.11

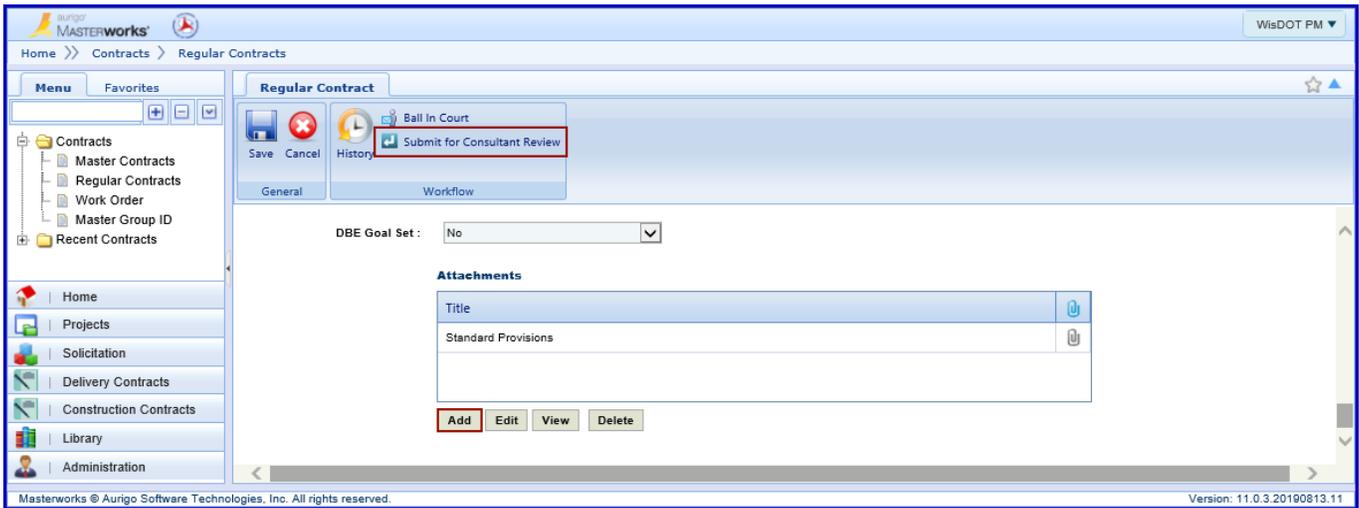
Type a short Description of Services. Add the WisDOT Representative and Consultant Representative.

The screenshot displays the Masterworks software interface for contract negotiation. The main window is titled "Regular Contract" and contains the following elements:

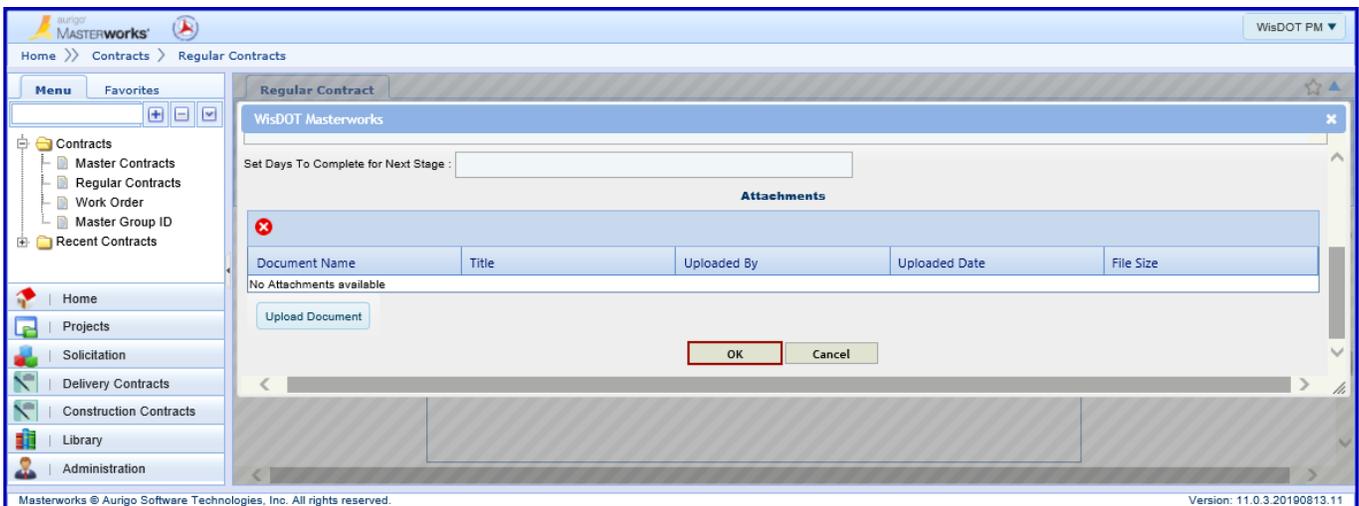
- Navigation:** Home >> Contracts > Regular Contracts. A "WisDOT PM" dropdown menu is in the top right.
- Left Panel:** A tree view showing "Contracts" with sub-items: Master Contracts, Regular Contracts, Work Order, Master Group ID, and Recent Contracts. A vertical menu at the bottom left includes Home, Projects, Solicitation, Delivery Contracts, Construction Contracts, Library, and Administration.
- Contract Details:**
 - Description of Services:** A text box containing "Construction oversight engineering".
 - WisDOT Department Representative:** A table with columns: Contact Name, Title, Work Address, Email, Telephone. One entry is visible: Mitch Patoka, Project Manager, 4822 Madison Yards Way 4th Floor South, mitchell.patoka@aurigo, (808)266-1744.
 - Consultant Representative:** A table with columns: Contact Name, Work Address, Email, Telephone. One entry is visible: Alpha Con PL Manager, 120 Main St. Amherst, WI 54408, alphaconPLManager@alpha, (800)866-0666.
 - Consultant Services to be performed at Departments office located at:** 1681 Second Ave. South; Wisconsin Rap
 - Deliver Project Documents to:** 1681 Second Ave. South; Wisconsin Rap
 - Compensation for all services provided by PRIME CONSULTANT under terms of the contract shall be for:** 1,172,898.40

At the bottom of the window, it says "Masterworks © Aurigo Software Technologies, Inc. All rights reserved." and "Version: 11.0.3.20190813.11".

Add Standard Provisions and Special Provisions. Click Submit for Consultant Review to send it to the consultant to review.

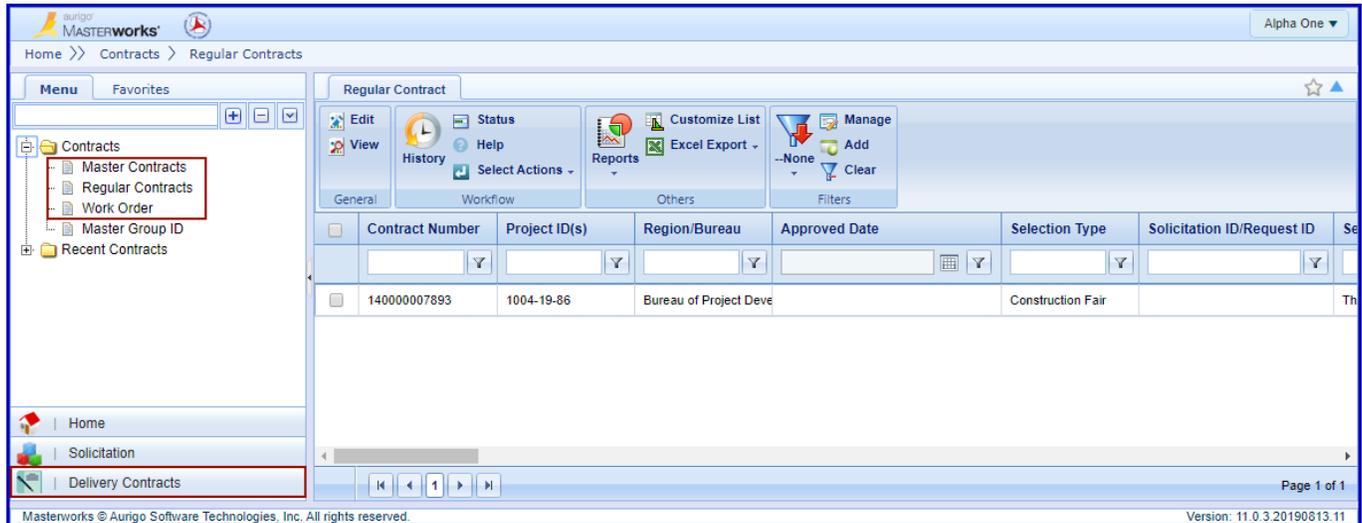


Click OK on the acknowledgement screen.

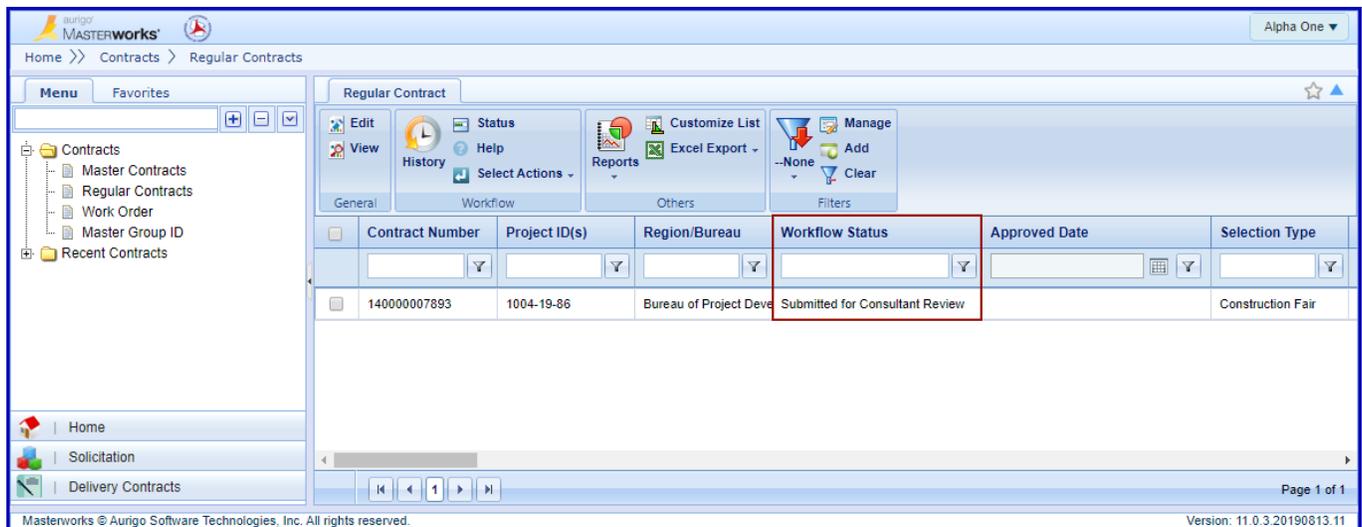


8 Review Contract – Consultant

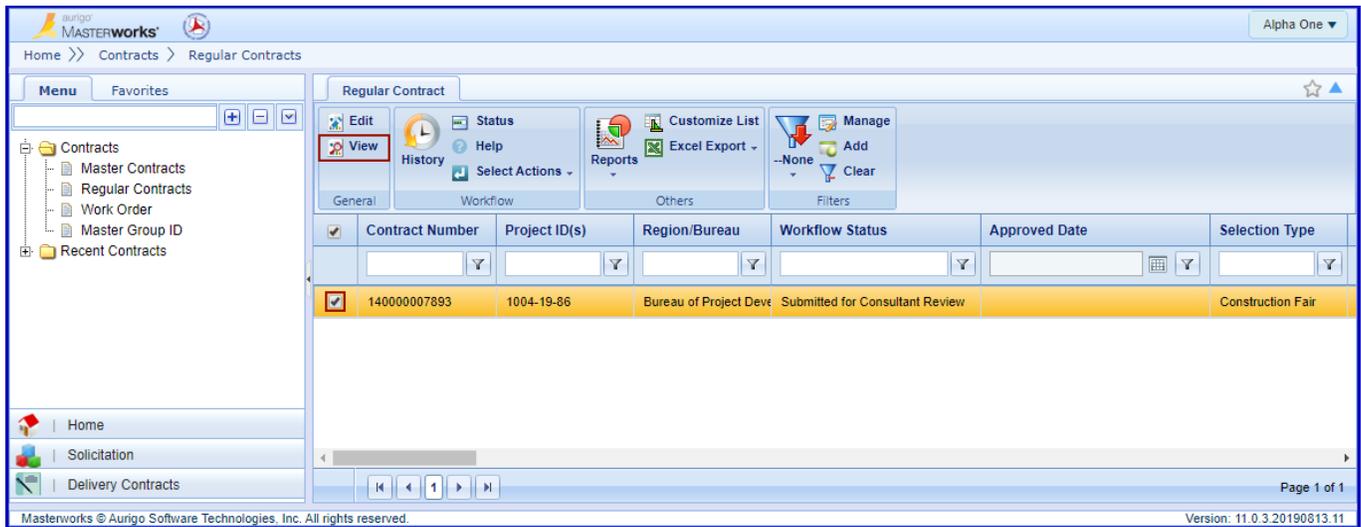
Navigate to the **Delivery Contracts** module and expand the folder **Contracts** which contains four links: **Master Contracts** to view master contracts, **Regular Contracts** to view contracts from bimonthly and construction fair solicitations and small purchase and sole source requests and **Work Order** to view work orders. Consultants cannot view the Master Group ID link.



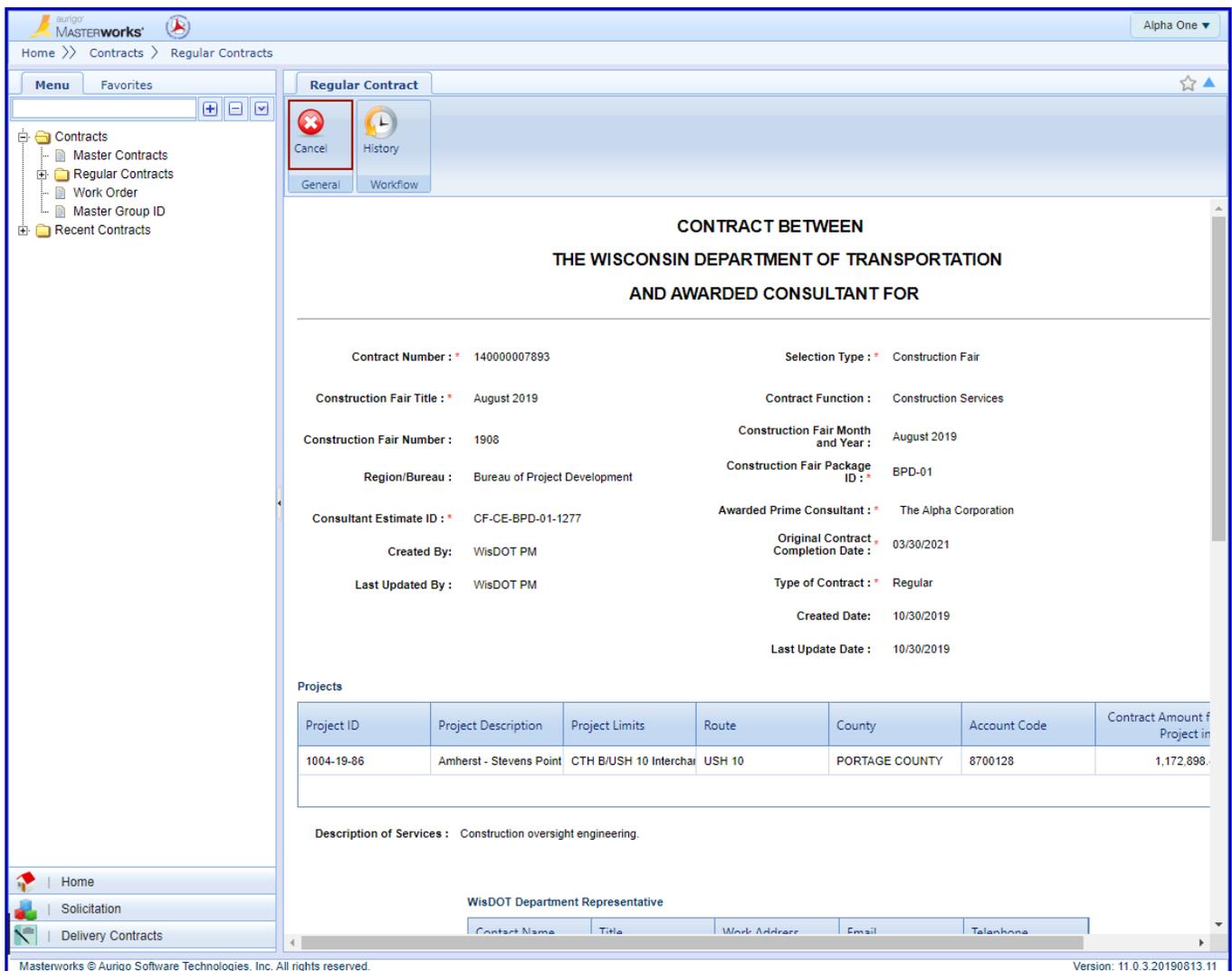
Contracts/Work Orders requiring consultant approval have a **Workflow Status** of “Submitted for Consultant Review.”



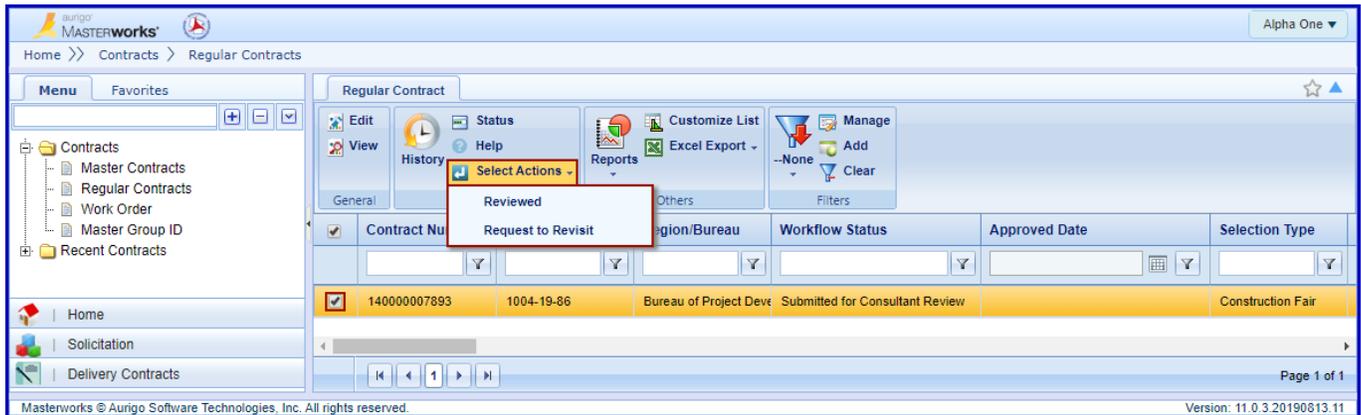
To view the contract, check the box next to the contract and click **View**.



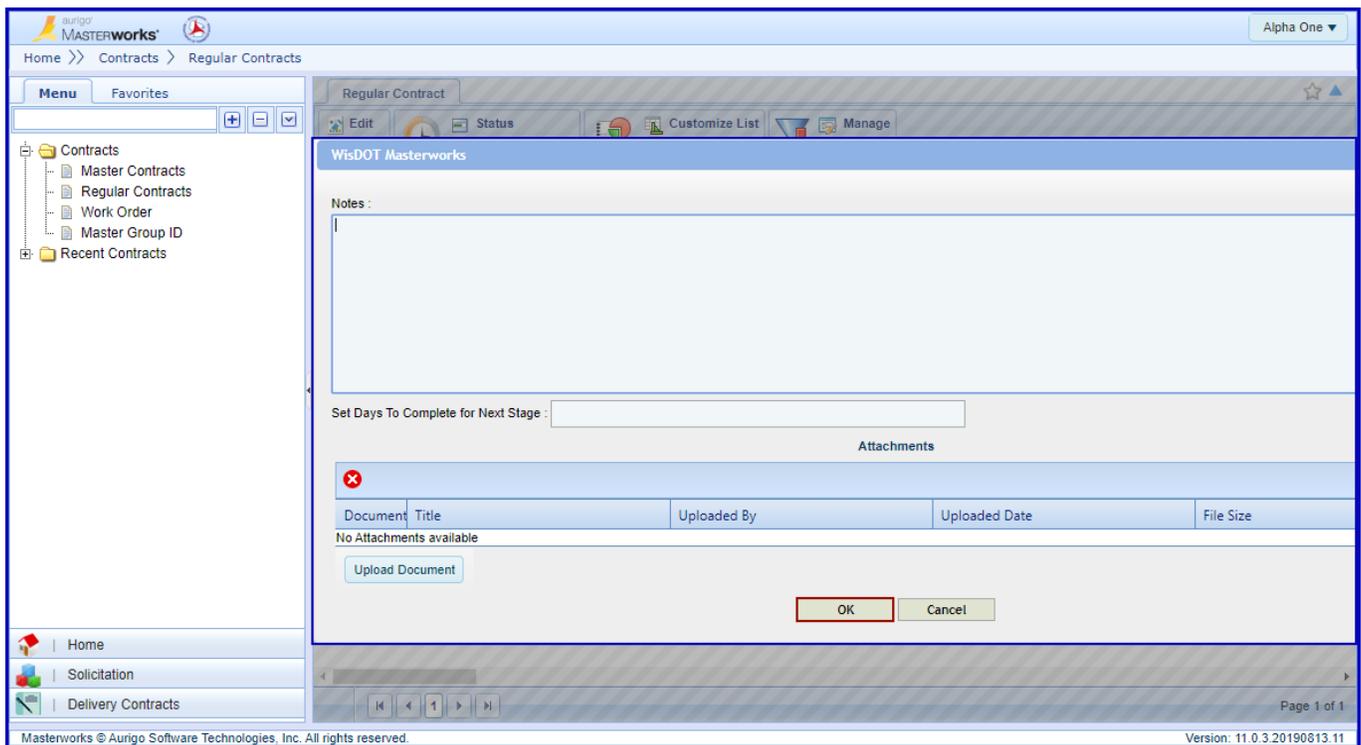
Review the contract. Click **Cancel** to return to the list page.



Check the box next to the contract and click **Select Actions**. Clicking **Reviewed** will approve the contract. Clicking **Request to Revisit** will send it back to WisDOT for revisions.

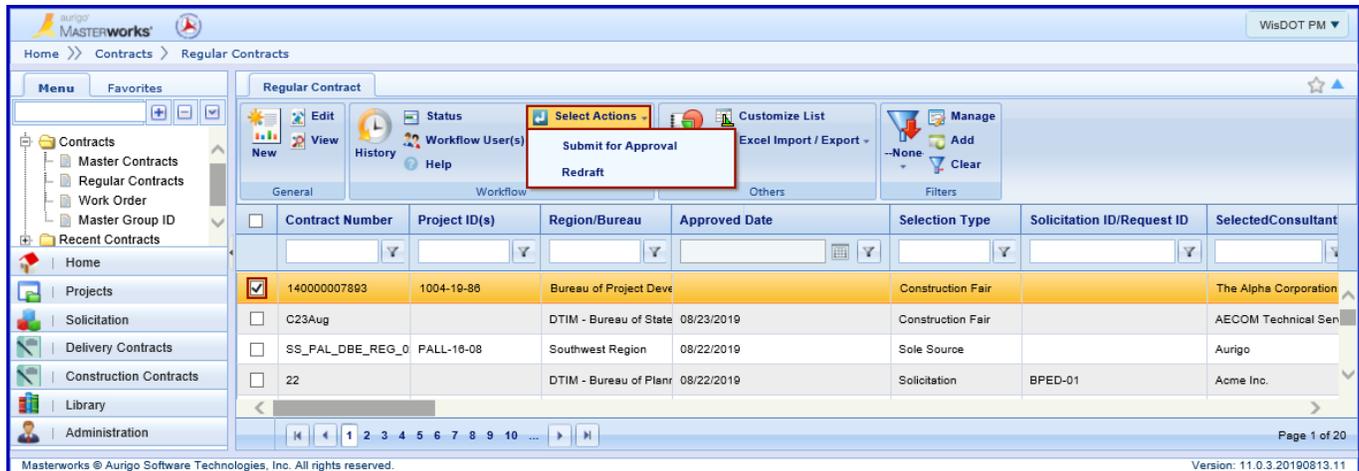


Click **OK** on the acknowledgment screen.



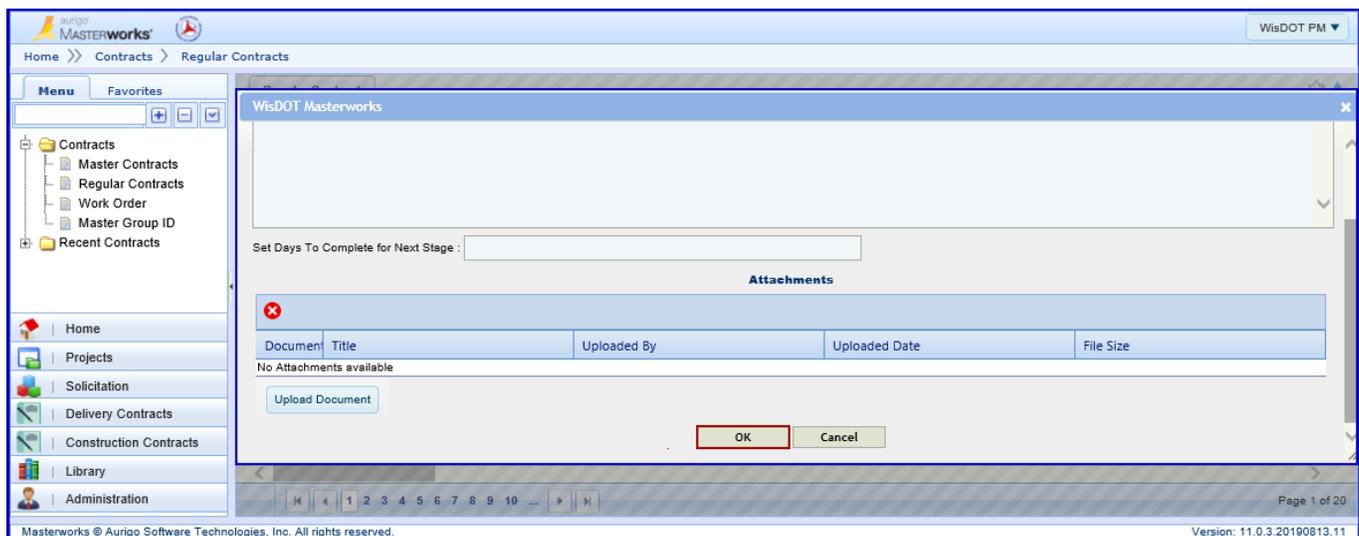
9 Submit Contract for Approval - WisDOT

After the contract has been approved by the consultant check the box next to the contract and click **Select Actions**. Click **Submit for Approval** to send the contract for approval in Central Office. Click **Redraft** if changes need to be made to the contract.



Contract Number	Project ID(s)	Region/Bureau	Approved Date	Selection Type	Solicitation ID/Request ID	Selected Consultant
<input checked="" type="checkbox"/> 14000007893	1004-19-88	Bureau of Project Deve		Construction Fair		The Alpha Corporation
<input type="checkbox"/> C23Aug		DTIM - Bureau of State	08/23/2019	Construction Fair		AECOM Technical Sen
<input type="checkbox"/> SS_PAL_DBE_REG_0	FALL-10-08	Southwest Region	08/22/2019	Sole Source		Aurigo
<input type="checkbox"/> 22		DTIM - Bureau of Plan	08/22/2019	Solicitation	BPED-01	Acme Inc.

Click **OK** on the acknowledgement screen.



WisDOT Masterworks

Set Days To Complete for Next Stage :

Attachments

Document	Title	Uploaded By	Uploaded Date	File Size
No Attachments available				

After clicking Submit for Approval send a completed DT25 to Diane Phaneuf.