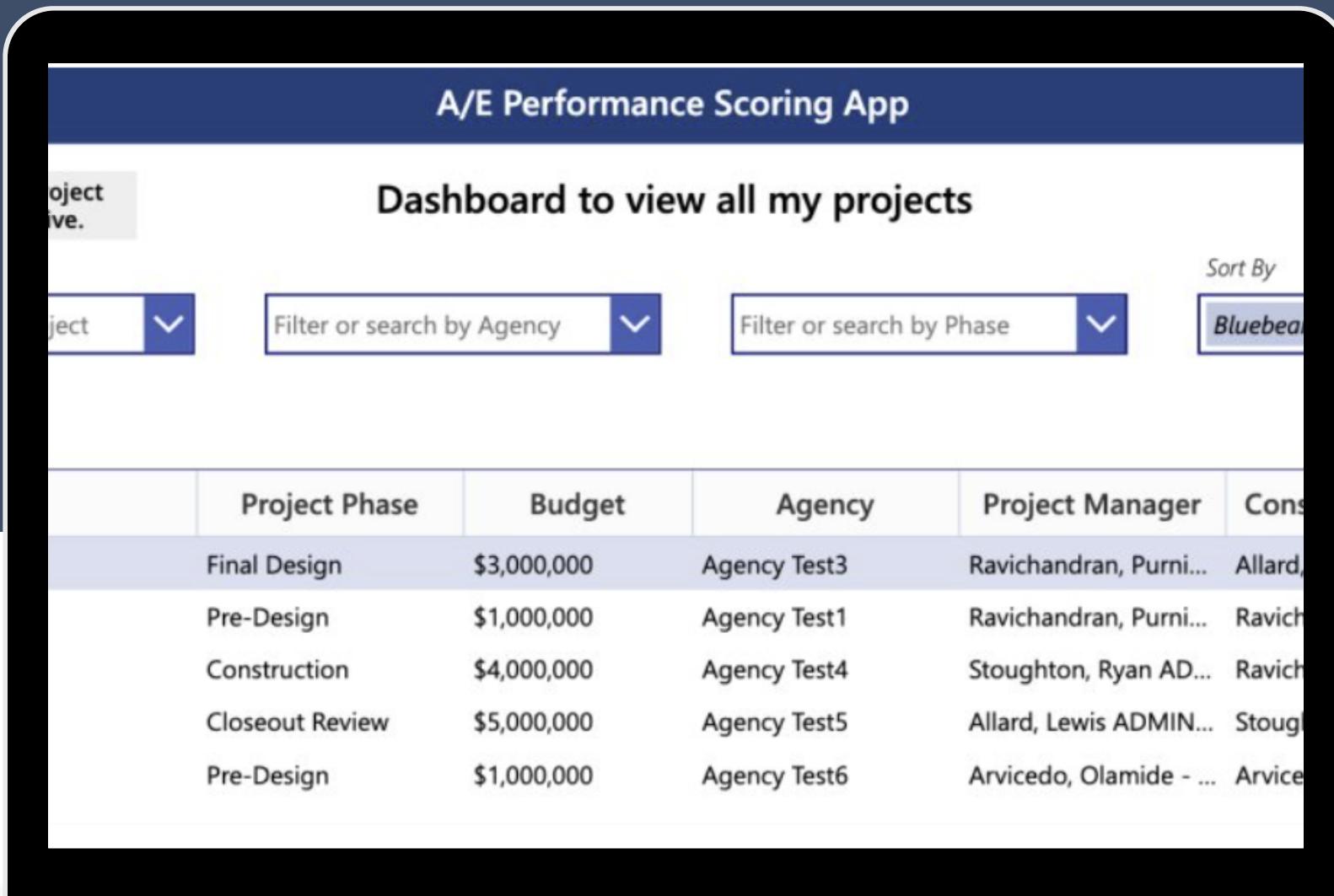


e-Builder User Training

A/E Performance Scoring Application

Informational How-To Guide



The screenshot shows the 'A/E Performance Scoring App' dashboard. The title 'Dashboard to view all my projects' is displayed. Below the title are several filter options: 'Project' dropdown, 'Filter or search by Agency' dropdown, 'Filter or search by Phase' dropdown, and a 'Sort By' dropdown with 'Bluebeam' selected. A table below the filters lists five projects with columns: Project Phase, Budget, Agency, Project Manager, and Contact. The data is as follows:

Project Phase	Budget	Agency	Project Manager	Contact
Final Design	\$3,000,000	Agency Test3	Ravichandran, Purni...	Allard, Lewis
Pre-Design	\$1,000,000	Agency Test1	Ravichandran, Purni...	Ravichandran, Purni...
Construction	\$4,000,000	Agency Test4	Stoughton, Ryan AD...	Ravichandran, Purni...
Closeout Review	\$5,000,000	Agency Test5	Allard, Lewis ADMIN...	Stoughton, Ryan AD...
Pre-Design	\$1,000,000	Agency Test6	Arvicedo, Olamide - ...	Arvicedo, Olamide - ...



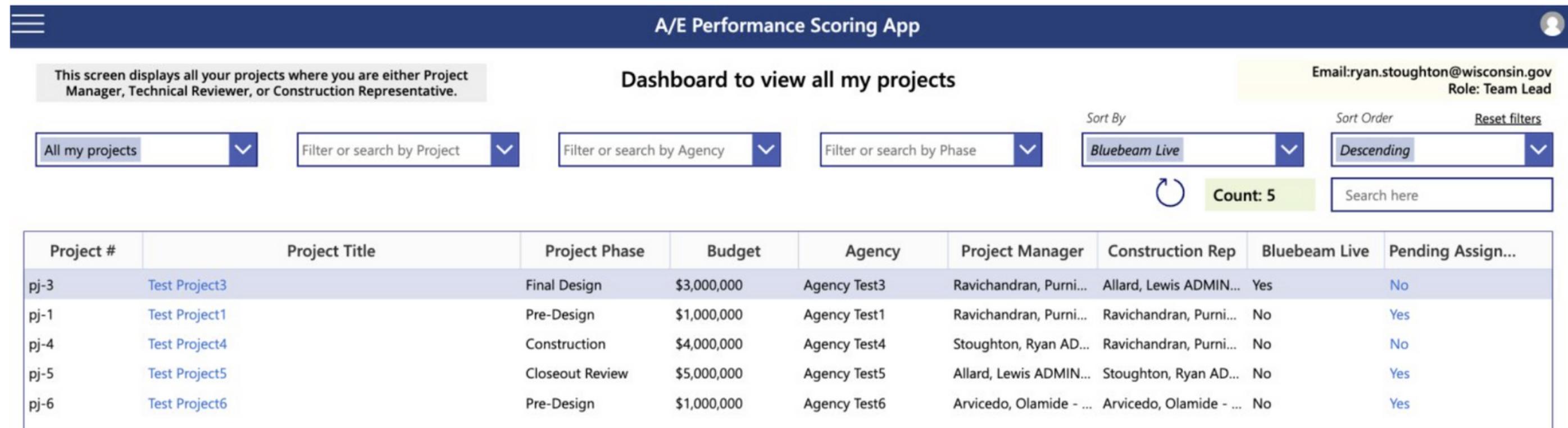
Table of Contents

1	Dashboard Overview	12	Team Leads Dashboard
3	Navigation Menu	15	Contact Us
4	Evaluations Dashboard		
8	A/E Firm Dashboard		
10	Role Assignments		

Dashboard Overview

The Architect & Engineering (A/E) Performance Scoring application is a custom application designed to provide users with a comprehensive overview of previous evaluations and overall A/E firm scores, as well as the ability to score firms working on current projects. While in the app, you will be able to filter by projects, agencies, phases and/or your assigned roles and create a new evaluation for a firm.

Once you navigate to the tool, you will see the below screen:

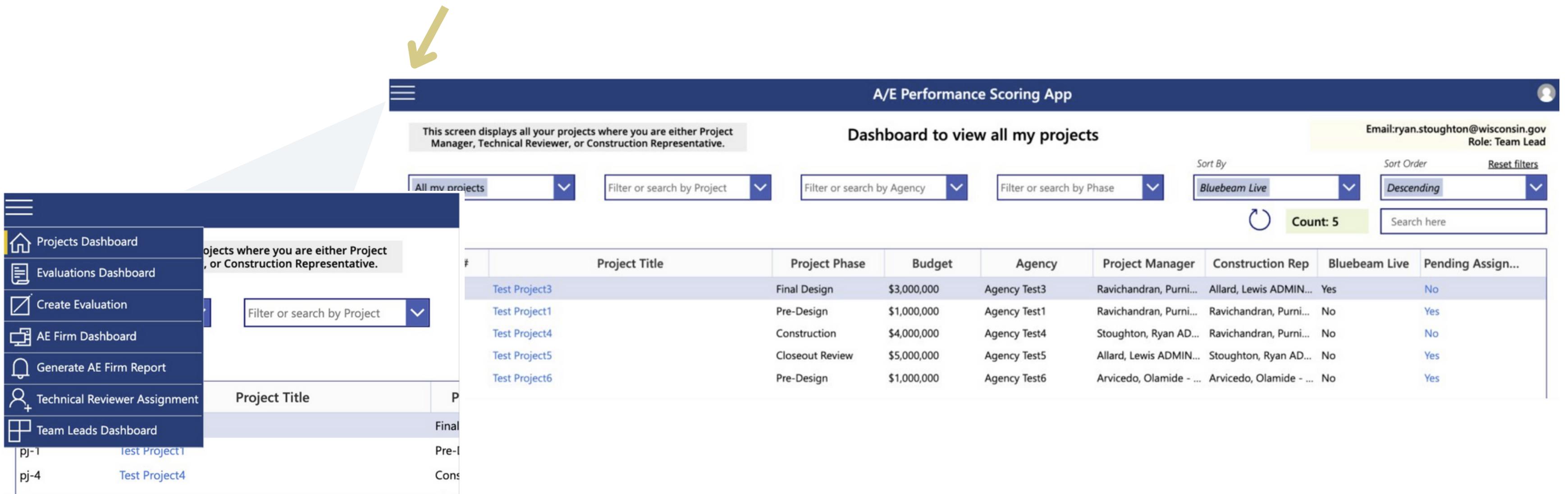


The screenshot shows the 'A/E Performance Scoring App' dashboard. At the top, there is a header with a user profile icon and the text 'Email:ryan.stoughton@wisconsin.gov' and 'Role: Team Lead'. Below the header, there is a message: 'This screen displays all your projects where you are either Project Manager, Technical Reviewer, or Construction Representative.' The main title is 'Dashboard to view all my projects'. There are several filter options: 'All my projects' dropdown, 'Filter or search by Project' dropdown, 'Filter or search by Agency' dropdown, 'Filter or search by Phase' dropdown, 'Sort By' dropdown set to 'Bluebeam Live', 'Sort Order' dropdown set to 'Descending', and a 'Reset filters' link. A 'Count: 5' indicator with a refresh icon is shown. A search bar with the placeholder 'Search here' is also present. The main content area displays a table with the following data:

Project #	Project Title	Project Phase	Budget	Agency	Project Manager	Construction Rep	Bluebeam Live	Pending Assign...
pj-3	Test Project3	Final Design	\$3,000,000	Agency Test3	Ravichandran, Purni...	Allard, Lewis ADMIN...	Yes	No
pj-1	Test Project1	Pre-Design	\$1,000,000	Agency Test1	Ravichandran, Purni...	Ravichandran, Purni...	No	Yes
pj-4	Test Project4	Construction	\$4,000,000	Agency Test4	Stoughton, Ryan AD...	Ravichandran, Purni...	No	No
pj-5	Test Project5	Closeout Review	\$5,000,000	Agency Test5	Allard, Lewis ADMIN...	Stoughton, Ryan AD...	No	Yes
pj-6	Test Project6	Pre-Design	\$1,000,000	Agency Test6	Arvicedo, Olamide - ...	Arvicedo, Olamide - ...	No	Yes

Dashboard Overview

To navigate to other areas of the application, click the menu button in the top-left corner and click a dashboard. A breakdown of the dashboard permissions can be found on the following page.



The screenshot shows the 'A/E Performance Scoring App' dashboard. The top navigation bar includes a menu icon, the app name, and a user profile icon. The main content area is titled 'Dashboard to view all my projects' and displays a table of project data. The sidebar on the left is titled 'Projects Dashboard' and lists several other dashboards: 'Evaluations Dashboard', 'Create Evaluation', 'AE Firm Dashboard', 'Generate AE Firm Report', 'Technical Reviewer Assignment', and 'Team Leads Dashboard'. The main content area includes a message about project roles, filter dropdowns, and a table with the following data:

#	Project Title	Project Phase	Budget	Agency	Project Manager	Construction Rep	Bluebeam Live	Pending Assign...
1	Test Project3	Final Design	\$3,000,000	Agency Test3	Ravichandran, Purni...	Allard, Lewis ADMIN...	Yes	No
2	Test Project1	Pre-Design	\$1,000,000	Agency Test1	Ravichandran, Purni...	Ravichandran, Purni...	No	Yes
3	Test Project4	Construction	\$4,000,000	Agency Test4	Stoughton, Ryan AD...	Ravichandran, Purni...	No	No
4	Test Project5	Closeout Review	\$5,000,000	Agency Test5	Allard, Lewis ADMIN...	Stoughton, Ryan AD...	No	Yes
5	Test Project6	Pre-Design	\$1,000,000	Agency Test6	Arvicedo, Olamide - ...	Arvicedo, Olamide - ...	No	Yes

Navigation Menu

Depending on your role, you will have access to specific sections of the application. A breakdown of the permissions by user can be found below:

All Users:

- Projects Dashboard
- Evaluations Dashboard
- Create Evaluation
- AE Firm Dashboard

Project Managers & Team Leads:

- Generate AE Firm Report
- Technical Reviewer Assignment

Team Leads:

- Team Leads Dashboard

The screenshot shows a navigation menu on the left with the following items:

- Projects Dashboard
- Evaluations Dashboard
- Create Evaluation
- AE Firm Dashboard
- Generate AE Firm Report
- Technical Reviewer Assignment
- Team Leads Dashboard

Below the menu is a table with the following data:

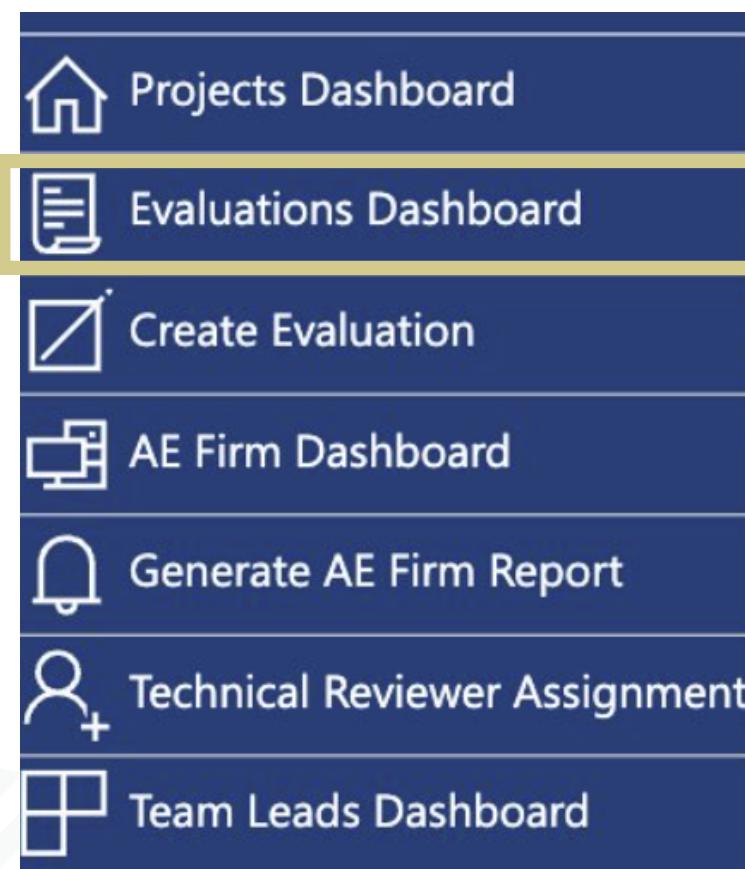
Project Title	
Test Project1	P
Test Project2	Final
Test Project3	Pre-Sub
Test Project4	Cons

A tooltip is visible on the 'Create Evaluation' menu item, stating: 'objects where you are either Project Manager, or Construction Representative.'

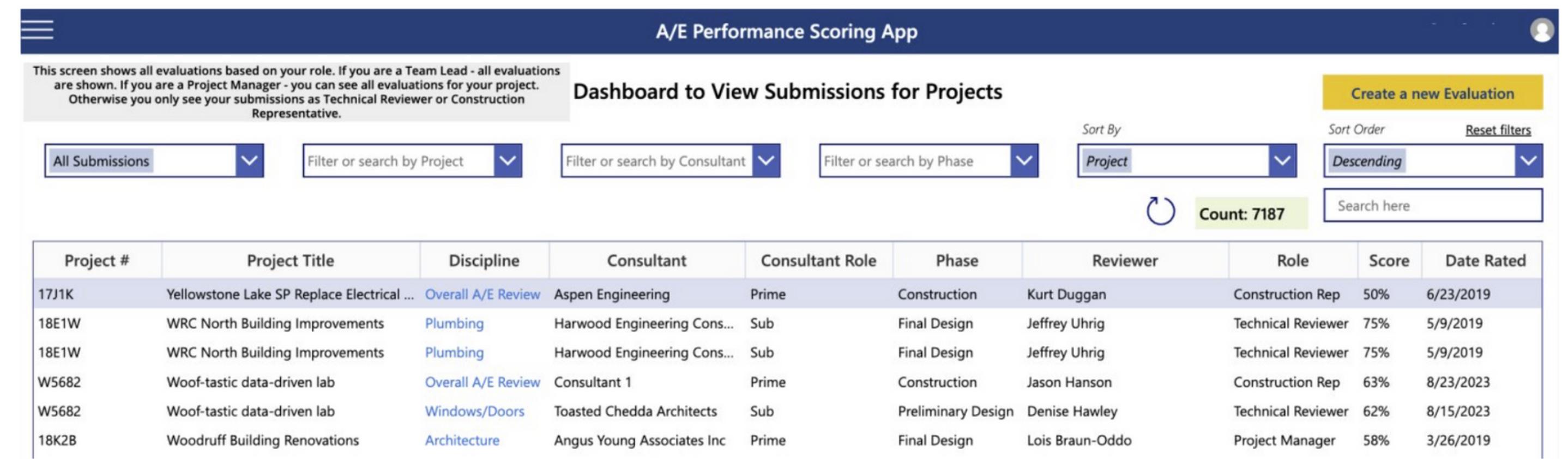
A filter bar is also visible on the right side of the dashboard.

Evaluations Dashboard

From the main menu, navigate to the Evaluations Dashboard. Here, you can view your previously submitted evaluations (and if you're a PM, view all evaluations submitted for your projects) or create a new evaluation for an A/E.



The image shows a vertical menu on the left side of the screen. The menu items are: Projects Dashboard (selected), Evaluations Dashboard (highlighted with a yellow box), Create Evaluation, AE Firm Dashboard, Generate AE Firm Report, Technical Reviewer Assignment, and Team Leads Dashboard.



The image shows the 'A/E Performance Scoring App' interface. The title is 'A/E Performance Scoring App' and the sub-section is 'Dashboard to View Submissions for Projects'. A message box states: 'This screen shows all evaluations based on your role. If you are a Team Lead - all evaluations are shown. If you are a Project Manager - you can see all evaluations for your project. Otherwise you only see your submissions as Technical Reviewer or Construction Representative.' There are several filter options: 'All Submissions', 'Filter or search by Project', 'Filter or search by Consultant', 'Filter or search by Phase', 'Project' (selected), 'Sort Order' (Descending), and 'Reset filters'. A search bar says 'Search here'. A circular icon with a refresh symbol and the text 'Count: 7187' is also present. The main table has columns: Project #, Project Title, Discipline, Consultant, Consultant Role, Phase, Reviewer, Role, Score, and Date Rated. The data in the table is as follows:

Project #	Project Title	Discipline	Consultant	Consultant Role	Phase	Reviewer	Role	Score	Date Rated
17J1K	Yellowstone Lake SP Replace Electrical ...	Overall A/E Review	Aspen Engineering	Prime	Construction	Kurt Duggan	Construction Rep	50%	6/23/2019
18E1W	WRC North Building Improvements	Plumbing	Harwood Engineering Cons...	Sub	Final Design	Jeffrey Uhrig	Technical Reviewer	75%	5/9/2019
18E1W	WRC North Building Improvements	Plumbing	Harwood Engineering Cons...	Sub	Final Design	Jeffrey Uhrig	Technical Reviewer	75%	5/9/2019
W5682	Woof-tastic data-driven lab	Overall A/E Review	Consultant 1	Prime	Construction	Jason Hanson	Construction Rep	63%	8/23/2023
W5682	Woof-tastic data-driven lab	Windows/Doors	Toasted Chedda Architects	Sub	Preliminary Design	Denise Hawley	Technical Reviewer	62%	8/15/2023
18K2B	Woodruff Building Renovations	Architecture	Angus Young Associates Inc	Prime	Final Design	Lois Braun-Oddo	Project Manager	58%	3/26/2019

Create an Evaluation

To create an evaluation, click the Create a new Evaluation button in the right-hand corner of the dashboard. This will prompt the evaluation form. Select the appropriate information from each dropdown menu and once complete, click Submit. (Note: Project, Phase, and Discipline options are based on the role selected.)

The screenshot shows the A/E Performance Scoring App interface. On the left, a vertical sidebar menu lists several options: Projects Dashboard, Evaluations Dashboard, Create Evaluation (which is highlighted with a yellow box and has a yellow arrow pointing to it), AE Firm Dashboard, Generate AE Firm Report, Technical Reviewer Assignment, and Team Leads Dashboard. The main content area has a header 'A/E Performance Scoring App' and a sub-header 'Dashboard to View Submissions for Projects'. It includes several filter dropdowns: 'All Submissions', 'Filter or search by Project', 'Filter or search by Consultant', 'Filter or search by Phase', 'Sort By' (set to 'Project'), 'Sort Order' (set to 'Descending'), and 'Res filters'. A yellow button labeled 'Create a new Evaluation' is located in the top right. Below this is a second form titled 'Project Selection for Evaluation'. It has fields for 'Role' (radio buttons for 'Project Manager' (selected), 'Technical Reviewer', and 'Construction Rep'), 'Project Title' (dropdown set to 'pj-4 Test Project4'), 'Phase' (dropdown set to 'Pre-Design'), 'Discipline' (dropdown set to 'Overall A/E Review'), 'Prime Consultant' (dropdown set to 'Consultant 2'), and 'Sub Consultant' (dropdown). A checkbox labeled 'Score the Sub consultant for this review' is present. A yellow arrow points to this checkbox. A yellow button labeled 'SUBMIT' is at the bottom right of the form. A note in the bottom left of the main content area says: 'If you wish to score a sub consultant on the project, please check this box.'

Create an Evaluation - Scoring

Once you submit an evaluation, you will be prompted to enter rating scores for the A/E in various categories. Enter the rating number in the appropriate text box for each category.

The ratings are:

- 0 = Unacceptable
- 1 = Poor
- 2 = Satisfactory
- 3 = Very Good
- 4 = Excellent

Categories are dependent upon both your role and phrases of the project.

Also, note that you can utilize decimal places within the rating, but you cannot enter a negative number and you cannot exceed a value of 4.

This screen shows ratings and comments. You can edit your own submission before it's locked and view only all scores of a project as a PM or TL

Pre-Design Project Manager Evaluation by Stoughton, Ryan ADMIN - DOA (Avicado)

Project details			
Date Scored	7/26/2023	Project Manager	Stoughton, Ryan ADMIN - DOA (Avicado)
Project Number	pj-4	Project Name	Test Project4
Agency	Agency Test4	Institution	Institution Test4
Prime Consultant	Consultant 2	Budget	4000000
Sub Consultant	N/A	Discipline	Overall A/E Review

Category	Rating
Understands/Evaluates/Conforms to Program	4
Development of Design Options	2
Completeness and Coordination of Documents	4
Timeliness/Responsiveness to Schedule	3
Budget Analysis/Cost Estimate	4
Communications	3

NOTE: Rating numbers generally correspond to:
0 = UNACCEPTABLE
1 = POOR
2 = SATISFACTORY
3 = VERY GOOD
4 = EXCELLENT

Do not use N/A as only numbers may be entered.
To give a neutral rating, use the value 2.0

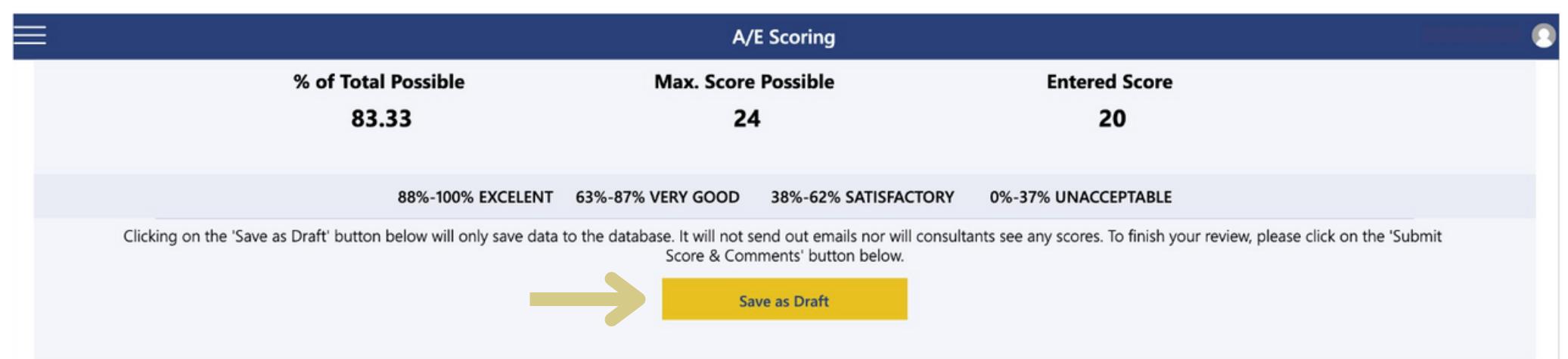
Create an Evaluation - Scoring

This section of the Scoring screen shows how your scores fall along the scoring scale.

If you want to save a draft of your evaluation without submitting it, click the **Save as Draft** button. Please note that the score calculates in real-time, so there is no need to save as draft in order to view or change your score.

Otherwise, scroll to the bottom of the screen, enter any comments if desired, then click **Submit Score & Comments**.

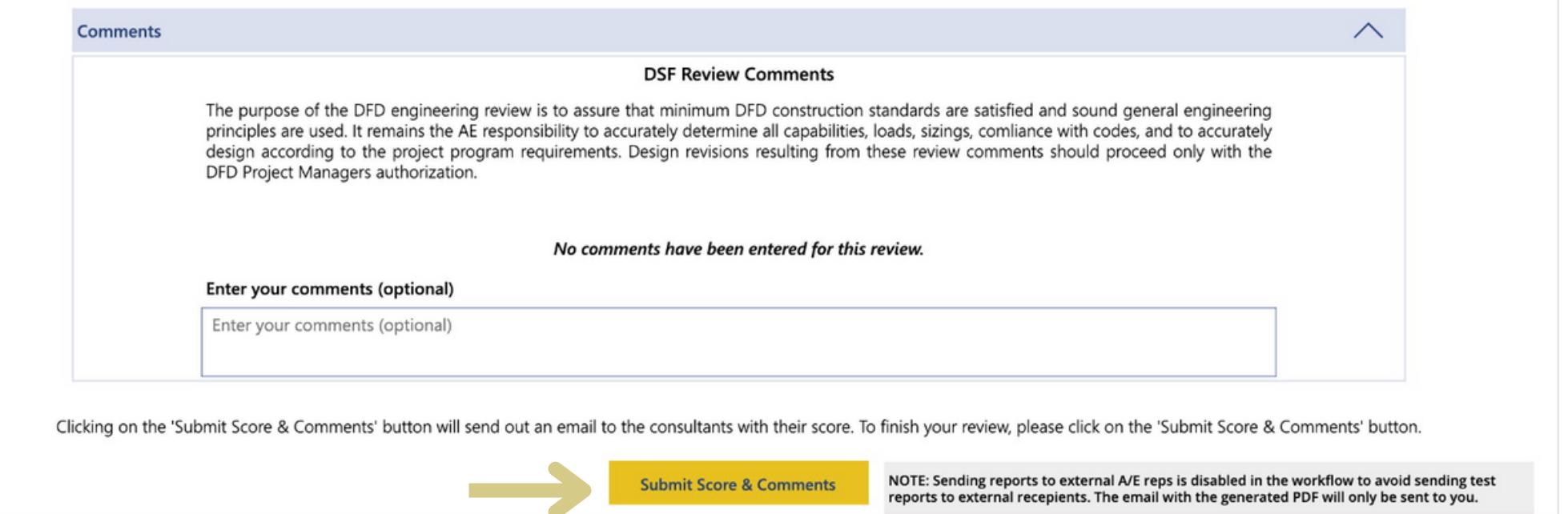
Please note that comments entered here are intended to be general in nature, and that the A/E will not have a formal opportunity to respond to these comments within the system. Any specific comments or comments in which a response is desired should be input via the associated bluebeam session.



The screenshot shows the 'A/E Scoring' table with the following data:

% of Total Possible	Max. Score Possible	Entered Score
83.33	24	20

Below the table, a message states: "Clicking on the 'Save as Draft' button below will only save data to the database. It will not send out emails nor will consultants see any scores. To finish your review, please click on the 'Submit Score & Comments' button below." A yellow arrow points to the **Save as Draft** button.



The screenshot shows the 'Comments' section with the following content:

DSF Review Comments
The purpose of the DFD engineering review is to assure that minimum DFD construction standards are satisfied and sound general engineering principles are used. It remains the AE responsibility to accurately determine all capabilities, loads, sizings, compliance with codes, and to accurately design according to the project program requirements. Design revisions resulting from these review comments should proceed only with the DFD Project Managers authorization.

No comments have been entered for this review.

Enter your comments (optional)
Enter your comments (optional)

Below the comments section, a message states: "Clicking on the 'Submit Score & Comments' button will send out an email to the consultants with their score. To finish your review, please click on the 'Submit Score & Comments' button." A yellow arrow points to the **Submit Score & Comments** button. A note at the bottom right says: "NOTE: Sending reports to external A/E reps is disabled in the workflow to avoid sending test reports to external recipients. The email with the generated PDF will only be sent to you."

A/E Firm Dashboard

The A/E Firm dashboard shows a list of all A/E firms and their latest overall score reports (if available). To generate a report, click the **Generate AE Report** button or navigate to the Generate AE Firm Report section in the main menu.

This screen shows the list of all A/E firms and their latest overall scores report (if available)

Dashboard to view scores for all A/E firms

Generate AE report

Reset filters

Count: 220

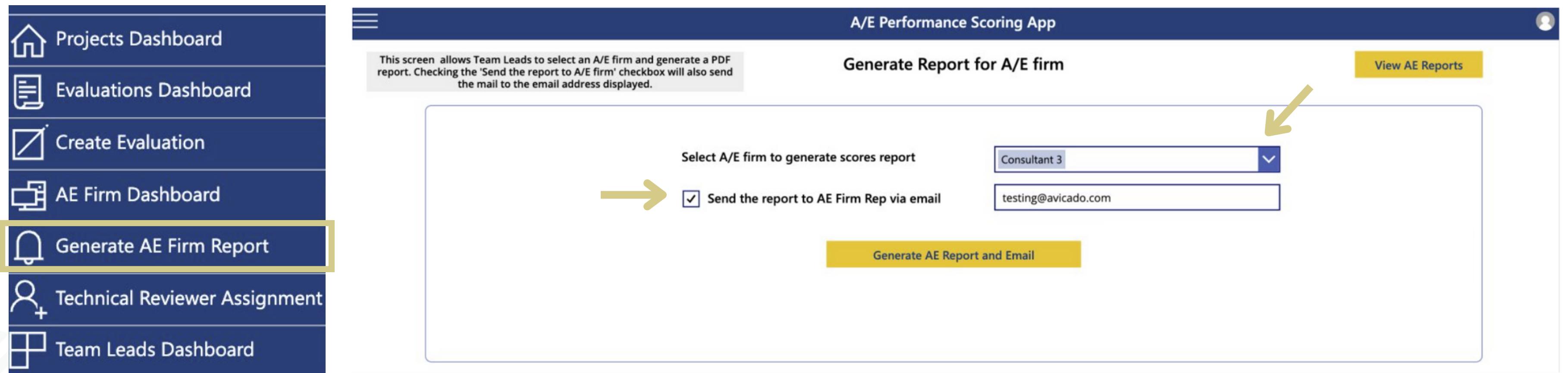
Search here

AE Firm Name	AE Firm City	AE Firm Phone	MBE	Small Project Desi...	Report Link	Report generated on
ZS, LLC	Milwaukee	414-727-5000	No	No	View Report	2/13/2024
Zoe Engineering LLC	Milwaukee	Mil-wau-ukee	Yes	No		
Zimmerman Architectural Studios, Inc.	Milwaukee	414-476-9500	No	No		
Workshop Architects, Inc.	Milwaukee	414-272-8822	No	No	View Report	2/13/2024
Westbrook Associated Engineers	Spring Green	608-588-7866	No	No		
Wendel Architectural Resources, Inc.	Eau Claire	715-832-4848	No	No		
Water Technology, Inc.	Beaver Dam	Bea-ver- Dam	No	No		
Water Quality Investigations LLC	Mount Horeb	888-499-2507	No	No		
Vierbicher Associates, Inc.	Reedsburg	--	No	No		
Venture Architects	Milwaukee	414-271-3359	No	No		
Vantage Architects, Inc.	La Crosse	608-784-2729	No	No		

You can also view existing/created reports by selecting this link.

Generate AE Firm Report

Once clicked, you will be navigated to the Generate AE Firm Report screen. This screen allows Project Managers and Team Leads to select an A/E firm and generate a PDF report. From the dropdown menu, select the A/E firm for the generated report. Checking the “Send the report to the A/E firm Rep via email” will also send the report to the email address that is listed. (Note: The default email address can be overwritten if needed).



The screenshot shows the A/E Performance Scoring App interface. On the left, a sidebar menu lists several options: Projects Dashboard, Evaluations Dashboard, Create Evaluation, AE Firm Dashboard, Generate AE Firm Report (which is highlighted with a yellow box), Technical Reviewer Assignment, and Team Leads Dashboard. The main content area is titled "A/E Performance Scoring App" and "Generate Report for A/E firm". It contains a sub-instruction: "This screen allows Team Leads to select an A/E firm and generate a PDF report. Checking the 'Send the report to A/E firm' checkbox will also send the mail to the email address displayed." Below this, there is a "Select A/E firm to generate scores report" dropdown menu set to "Consultant 3", and an input field for an email address, "testing@avicado.com". A checkbox labeled "Send the report to AE Firm Rep via email" is checked. A large yellow arrow points to the "Generate AE Report and Email" button at the bottom of the form. A smaller yellow arrow points to the "Send the report to AE Firm Rep via email" checkbox.

Role Assignments

This screen is used to assign Technical Reviewers to a project. If you are a Team Lead, all projects will be shown; otherwise, only the projects where you are a Project Manager will be shown. Once the review disciplines are requested, and reviewers names input (if known), you will see notices for if assignments are Approved or Pending review.



The screenshot shows the 'Technical Reviewer Role Assignment for a project' screen. The top navigation bar includes a 'Go to Team Leads Dashboard' button. The main content area displays a project summary for 'pj-1 Test Project1' with the following details:

Project Name	Test Project1	Project Manager	Ravichandran, Purnima ADMIN - DOA (Avicado)
Project Number	pj-1	Budget	\$1,000,000
Agency	Agency Test1	Institution	Institution Test1

Below the summary, there are two rows of review assignments. Each row consists of a reviewer's name, a dropdown menu for the discipline, and a trash can icon. The first row is for 'Stoughton, Ryan ADMIN - DOA (Avicado)' with disciplines 'Architecture' and 'Roofing'. The second row is for 'Allard, Lewis ADMIN (Avicado)' with disciplines 'Landscape Architecture' and 'Roofing'. At the bottom, there is a text input field 'Enter name or email address' and a dropdown menu for 'Interiors'.

- ✓ Approved
- ✓ Approved
- ✓ Approved
- ✓ Approved
- ? Pending review

The status will stay "Pending review" until all resources are approved.

Role Assignments (continued)

Email Notifications:

- Upon **request** by PMs to Team Leads
- Upon **approval** of resource to resource assigned and the PM
- Upon **completion** of all resource assignments

Team leads can update names

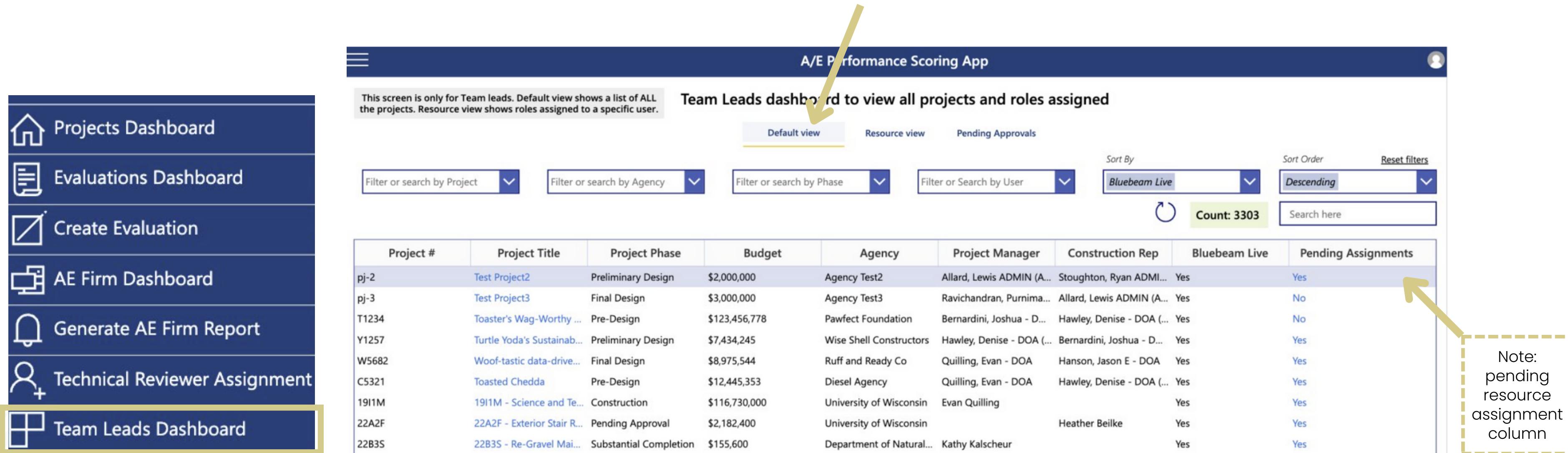
Team leads can delete the desired rows using the trash can button

Team leads can add additional lines using the plus button

Role	Resource Name	Actions
Architecture	Stoughton, Ryan ADMIN - DOA (Avicado)	trash can
Roofing	Allard, Lewis ADMIN (Avicado)	trash can
Landscape Architecture	Enter name or email address	trash can
Roofing	Stoughton, Ryan ADMIN - DOA (Avicado)	trash can
Interiors	Enter name or email address	trash can

Team Lead Dashboard: Default View

This dashboard is for Team Leads only. The Default view tab (shown below) includes a list of ALL projects.



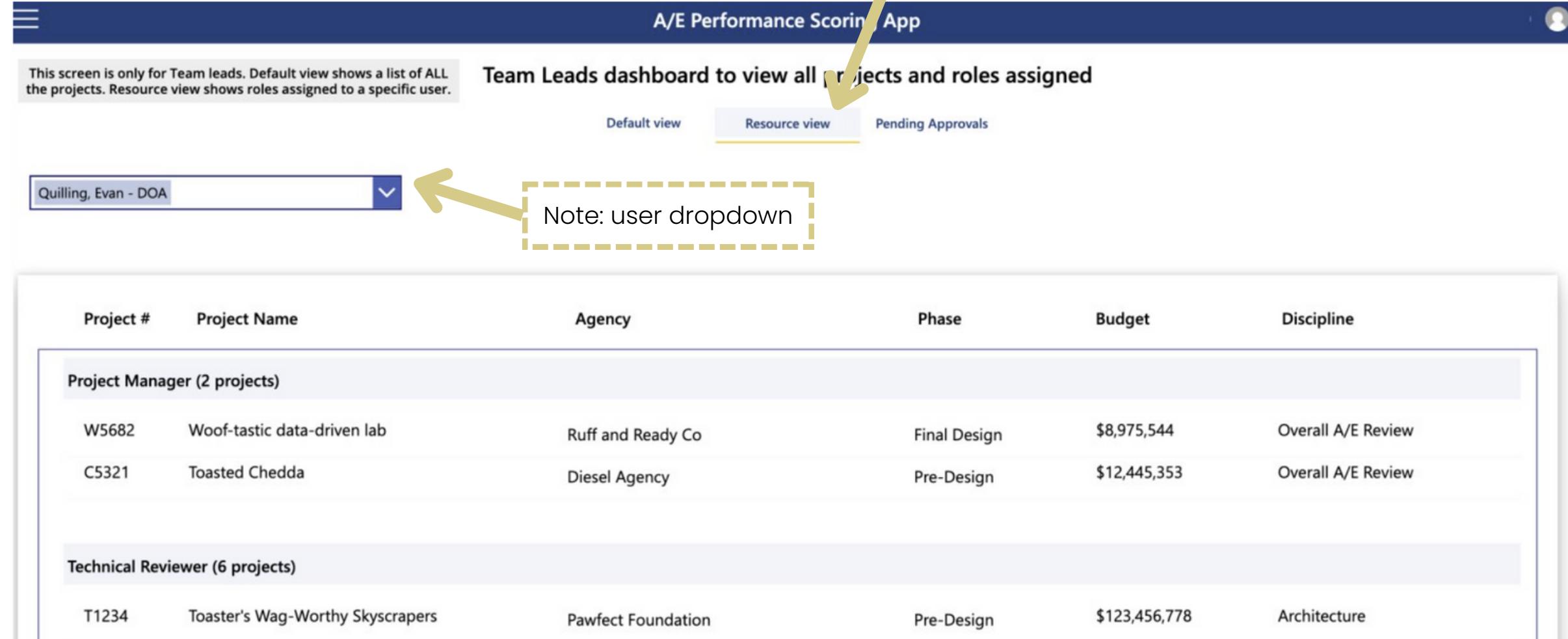
The screenshot shows the A/E Performance Scoring App interface. On the left, a sidebar menu lists several options: Projects Dashboard, Evaluations Dashboard, Create Evaluation, AE Firm Dashboard, Generate AE Firm Report, Technical Reviewer Assignment, and Team Leads Dashboard. The Team Leads Dashboard option is highlighted with a yellow box and arrow. The main content area is titled "A/E Performance Scoring App" and "Team Leads dashboard to view all projects and roles assigned". A message box states: "This screen is only for Team leads. Default view shows a list of ALL the projects. Resource view shows roles assigned to a specific user." Below this, there are tabs for "Default view" (which is selected and highlighted with a yellow box and arrow), "Resource view", and "Pending Approvals". There are also filter and search controls, including dropdowns for "Filter or search by Project", "Filter or search by Agency", "Filter or search by Phase", "Filter or Search by User", "Sort By" (set to "Bluebeam Live"), "Sort Order" (set to "Descending"), and a "Search here" input field. A table below the filters shows a list of projects with columns: Project #, Project Title, Project Phase, Budget, Agency, Project Manager, Construction Rep, Bluebeam Live, and Pending Assignments. The first few rows of the table are:

Project #	Project Title	Project Phase	Budget	Agency	Project Manager	Construction Rep	Bluebeam Live	Pending Assignments
pj-2	Test Project2	Preliminary Design	\$2,000,000	Agency Test2	Allard, Lewis ADMIN (A...	Stoughton, Ryan ADMI...	Yes	Yes
pj-3	Test Project3	Final Design	\$3,000,000	Agency Test3	Ravichandran, Purnima...	Allard, Lewis ADMIN (A...	Yes	No
T1234	Toaster's Wag-Worthy ...	Pre-Design	\$123,456,778	Pawfect Foundation	Bernardini, Joshua - D...	Hawley, Denise - DOA (...	Yes	No
Y1257	Turtle Yoda's Sustainab...	Preliminary Design	\$7,434,245	Wise Shell Constructors	Hawley, Denise - DOA (...	Bernardini, Joshua - D...	Yes	Yes
W5682	Woof-tastic data-drive...	Final Design	\$8,975,544	Ruff and Ready Co	Quilling, Evan - DOA	Hanson, Jason E - DOA	Yes	Yes
C5321	Toasted Chedda	Pre-Design	\$12,445,353	Diesel Agency	Quilling, Evan - DOA	Hawley, Denise - DOA (...	Yes	Yes
19I1M	19I1M - Science and Te...	Construction	\$116,730,000	University of Wisconsin	Evan Quilling		Yes	Yes
22A2F	22A2F - Exterior Stair R...	Pending Approval	\$2,182,400	University of Wisconsin		Heather Beilke	Yes	Yes
22B3S	22B3S - Re-Gravel Mai...	Substantial Completion	\$155,600	Department of Natural...	Kathy Kalscheur		Yes	Yes

A yellow arrow points to the "Default view" tab. Another yellow arrow points to the "Pending Assignments" column in the table. A dashed yellow box on the right is labeled "Note: pending resource assignment column".

Team Lead Dashboard: Resource View

This dashboard is for Team Leads only. The Resource view tab (shown below) includes roles assigned to a specific user.



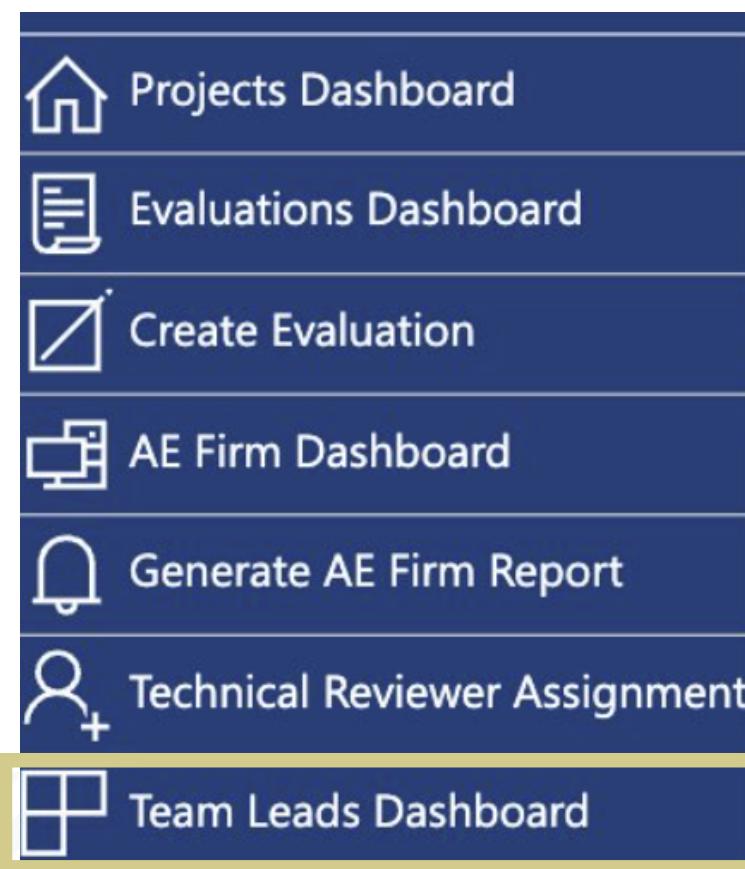
The screenshot shows the A/E Performance Scoring App interface. On the left, a sidebar menu lists several options: Projects Dashboard, Evaluations Dashboard, Create Evaluation, AE Firm Dashboard, Generate AE Firm Report, Technical Reviewer Assignment, and Team Leads Dashboard. The Team Leads Dashboard option is highlighted with a yellow box. The main content area is titled "A/E Performance Scoring App" and "Team Leads dashboard to view all projects and roles assigned". It includes a message about the screen being for Team Leads and the difference between Default view and Resource view. A user dropdown menu is shown, with a yellow arrow and dashed box pointing to it, labeled "Note: user dropdown". The Resource view tab is selected. Below the dropdown, there are two sections: "Project Manager (2 projects)" and "Technical Reviewer (6 projects)". The "Project Manager" section lists W5682 (Woof-tastic data-driven lab, Ruff and Ready Co, Final Design, \$8,975,544, Overall A/E Review) and C5321 (Toasted Chedda, Diesel Agency, Pre-Design, \$12,445,353, Overall A/E Review). The "Technical Reviewer" section lists T1234 (Toaster's Wag-Worthy Skyscrapers, Pawfect Foundation, Pre-Design, \$123,456,778, Architecture).

Project #	Project Name	Agency	Phase	Budget	Discipline
W5682	Woof-tastic data-driven lab	Ruff and Ready Co	Final Design	\$8,975,544	Overall A/E Review
C5321	Toasted Chedda	Diesel Agency	Pre-Design	\$12,445,353	Overall A/E Review

Project #	Project Name	Agency	Phase	Budget	Discipline
T1234	Toaster's Wag-Worthy Skyscrapers	Pawfect Foundation	Pre-Design	\$123,456,778	Architecture

Team Lead Dashboard: Pending Approvals

This dashboard is for Team Leads only. The Pending Approvals tab (shown below) includes assignments that are under review/pending approval.



A/E Performance Scoring App

This screen is only for Team leads. Default view shows a list of ALL the projects. Resource view shows roles assigned to a specific user.

Team Leads dashboard to view all projects and roles assigned

Default view Resource view **Pending Approvals**

Test Project1

Note: user dropdown

Go to Technical Reviewer Assignment Screen

Project #	Project Name	Technical Reviewer	Discipline	Assignment Status
Pending Review (Resource Assignment Needed)				
pj-1	Test Project1	Resource required	Interiors	Pending review
Approved (No Action Needed)				
pj-1	Test Project1	Stoughton, Ryan ADMIN - DOA (Avicado)	Architecture	Approved



Contact

For additional assistance, please contact a member of the DFD team.