

e-Builder User Training

A/E Performance Scoring Application

Informational How-To Guide

A/E Performance Scoring App

Dashboard to view all my projects

Project Filter or search by Agency Filter or search by Phase Sort By Bluebea

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

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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:

A/E Performance Scoring App

This screen displays all your projects where you are either Project Manager, Technical Reviewer, or Construction Representative.

Dashboard to view all my projects

Email:ryan.stoughton@wisconsin.gov
Role: Team Lead

All my projects

Filter or search by Project

Filter or search by Agency

Filter or search by Phase

Sort ByBluebeam Live

Sort OrderDescending

Reset filters

Count: 5

Search here

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. A navigation menu is open on the left, listing options: Projects Dashboard, Evaluations Dashboard, Create Evaluation, AE Firm Dashboard, Generate AE Firm Report, Technical Reviewer Assignment, and Team Leads Dashboard. The main dashboard area is titled 'Dashboard to view all my projects' and includes a header with the user's email (ryan.stoughton@wisconsin.gov) and role (Team Lead). Below the header are filters for 'All my projects', 'Filter or search by Project', 'Filter or search by Agency', 'Filter or search by Phase', 'Sort By' (Bluebeam Live), and 'Sort Order' (Descending). A 'Count: 5' indicator is shown. The main content is a table with columns: Project Title, Project Phase, Budget, Agency, Project Manager, Construction Rep, Bluebeam Live, and Pending Assign... The table lists six test projects with their respective phases, budgets, agencies, and managers.

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

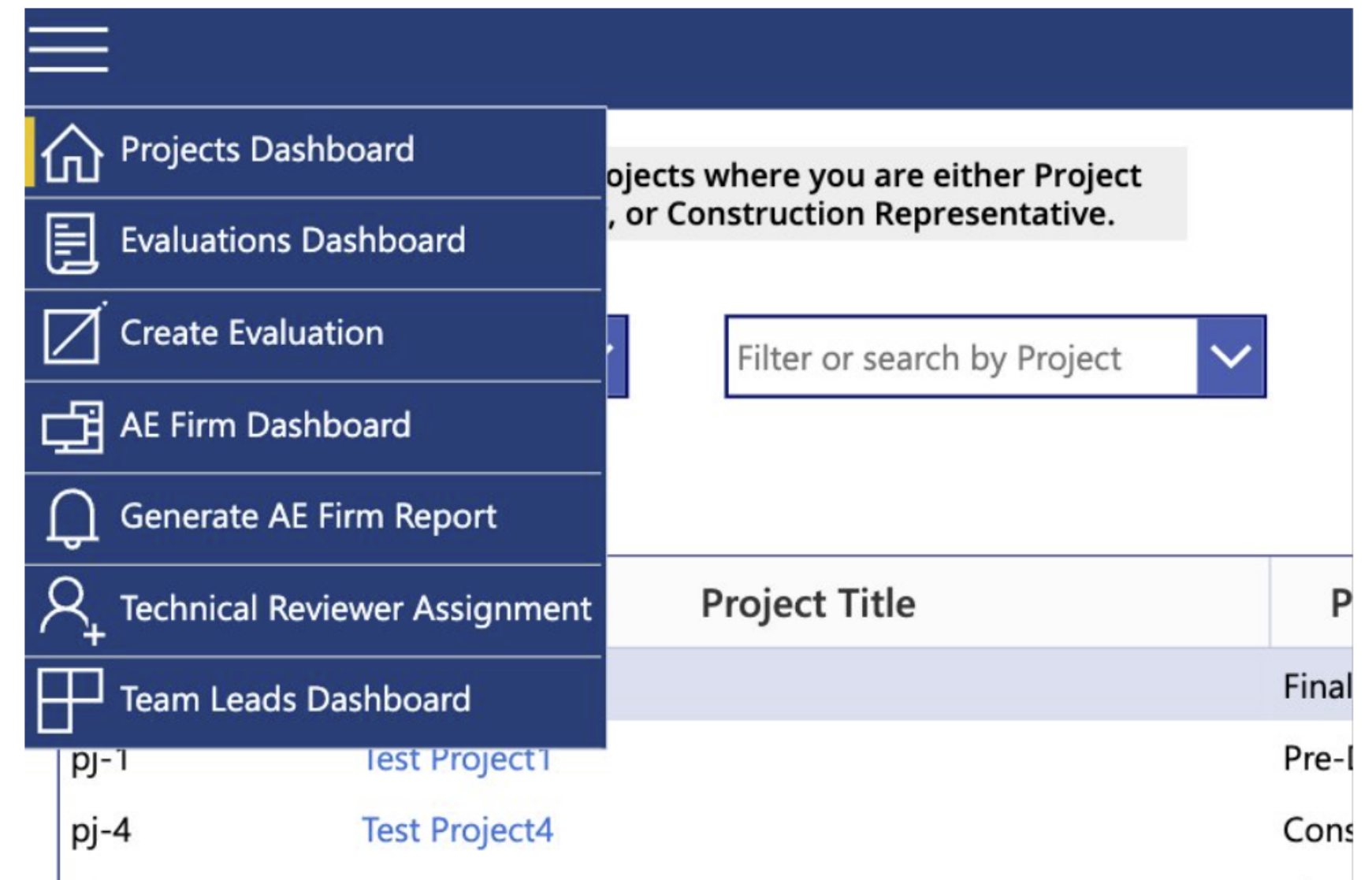
- Projects Dashboard
- Evaluations Dashboard
- Create Evaluation
- AE Firm Dashboard

Project Managers & Team Leads:

- Generate AE Firm Report
- Technical Reviewer Assignment

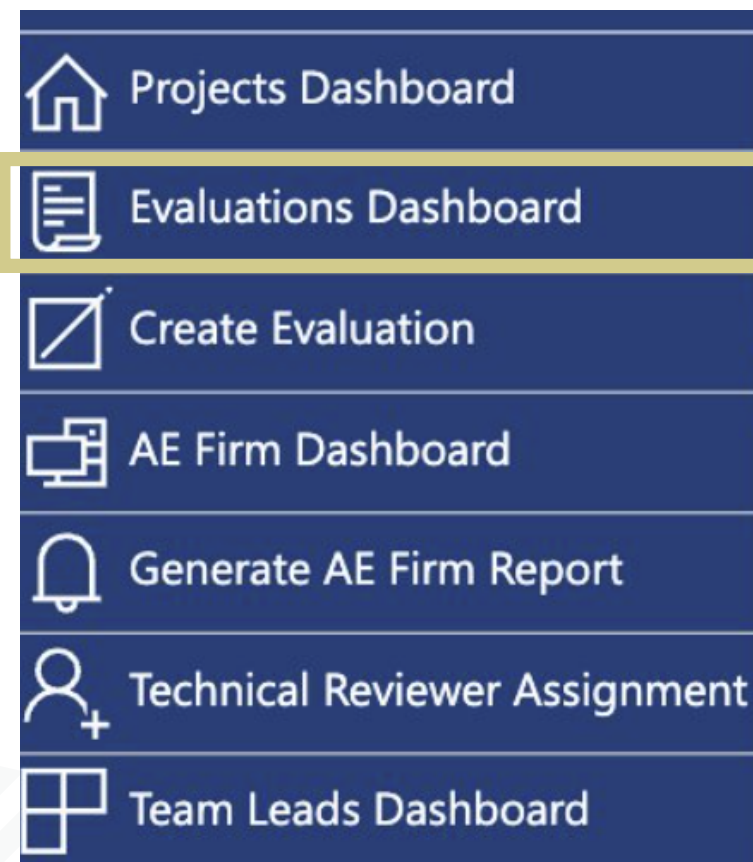
Team Leads:

- Team Leads Dashboard



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.



A/E Performance Scoring App

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.

Dashboard to View Submissions for Projects

Create a new Evaluation

All Submissions

Filter or search by Project

Filter or search by Consultant

Filter or search by Phase

Sort ByProject

Sort OrderDescending

Reset filters

Count: 7187

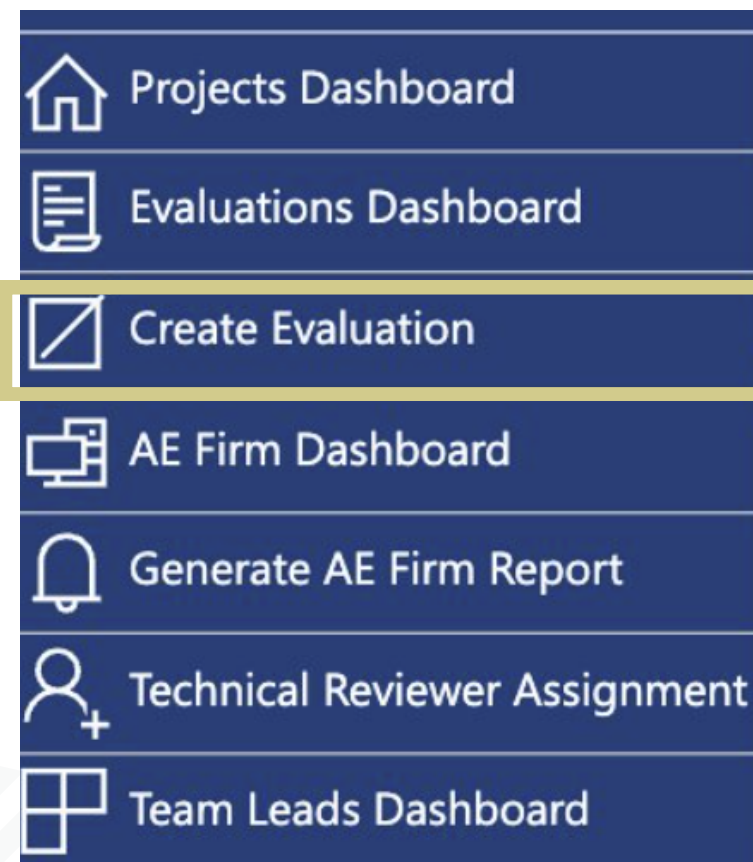
Search here

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

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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 image shows two screenshots of the 'A/E Performance Scoring App'. The top screenshot is the 'Dashboard to View Submissions for Projects'. It features a header with the app name and a user profile icon. Below the header is a message: '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.' The main area contains a 'Create a new Evaluation' button in the top right, highlighted with a yellow arrow. Below this are 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'), and 'Sort Order' (set to 'Descending'). The bottom screenshot is the 'Project Selection for Evaluation' form. It has a header with the app name and a user profile icon. Below the header is a message: 'This screen allows you to submit a new evaluation. Project, Phase and Discipline options are based on the role selected.' The form includes a 'Role' section with radio buttons for 'Project Manager' (selected), 'Technical Reviewer', and 'Construction Rep'. There are four dropdown menus: 'Project Title' (set to 'pj-4 Test Project4'), 'Phase' (set to 'Pre-Design'), 'Discipline' (set to 'Overall A/E Review'), and 'Prime Consultant' (set to 'Consultant 2'). There is also a 'Sub Consultant' dropdown. A checkbox labeled 'Score the Sub consultant for this review' is checked, with a yellow arrow pointing to it. At the bottom right is a yellow 'SUBMIT' button, with a yellow arrow pointing to it.

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.

A/E Scoring

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	<input type="text" value="4"/>
Development of Design Options	<input type="text" value="2"/>
Completeness and Coordination of Documents	<input type="text" value="4"/>
Timeliness/Responsiveness to Schedule	<input type="text" value="3"/>
Budget Analysis/Cost Estimate	<input type="text" value="4"/>
Communications	<input type="text" value="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 displays the 'A/E Scoring' interface. At the top, a dark blue header contains a menu icon, the title 'A/E Scoring', and a user profile icon. Below the header, a table shows the scoring scale:

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

Below the table, a horizontal bar represents the scoring scale with four segments: 88%-100% EXCELENT (blue), 63%-87% VERY GOOD (green), 38%-62% SATISFACTORY (yellow), and 0%-37% UNACCEPTABLE (red). A text box below the bar 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 a yellow button labeled 'Save as Draft'.

Below this section, a 'Comments' section is visible. It has a title bar with an upward arrow. The main content area is titled 'DSF Review Comments' and contains the text: '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.'

Below this text, it says 'No comments have been entered for this review.'

There is a text input field labeled 'Enter your comments (optional)'.

At the bottom, a text box 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 a yellow button labeled 'Submit Score & Comments'.


At the bottom right, a note states: '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.


 Projects Dashboard


 Evaluations Dashboard

 Create Evaluation

 AE Firm Dashboard

 Generate AE Firm Report

 Technical Reviewer Assignment

 Team Leads Dashboard

A/E Performance Scoring App

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

Filter or search by A/E Firm

Filter or search by City

Small Project Design?

MBE?

AE Firm

Descending

Count: 220

Search here

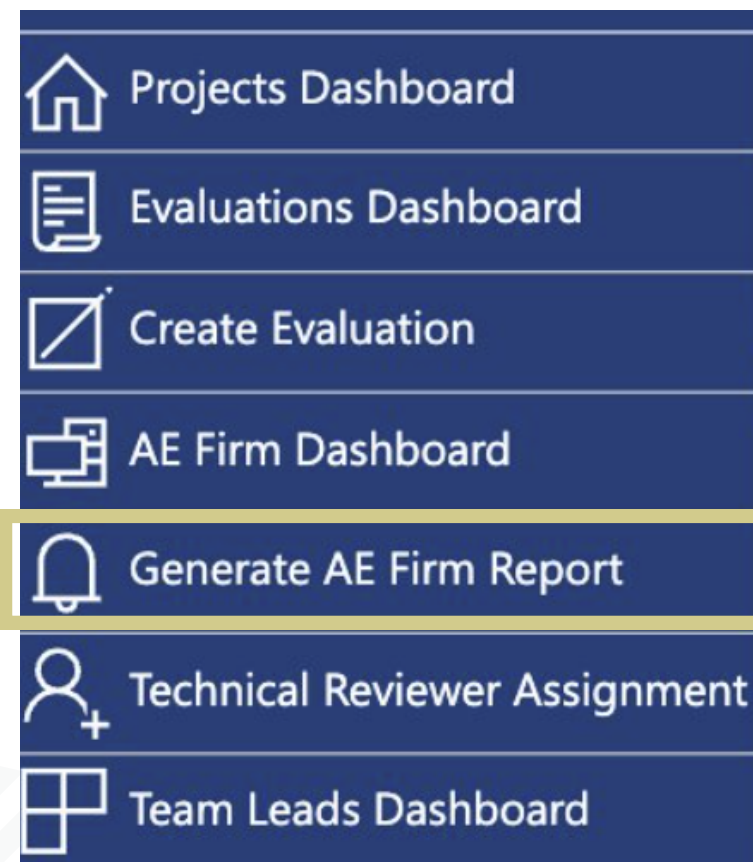
AE Firm Name	AE Firm City	AE Firm Phone	MBE	Small Project Desi...	Report Link	Report generated on
ZS, LLC	Milwaukee	414-727-5000	No	No	View Report	2/13/2024
Zoe Engineering LLC	Milwaukee	Mil-wau-ukee	Yes	No		
Zimmerman Architectural Studios, Inc.	Milwaukee	414-476-9500	No	No		
Workshop Architects, Inc.	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.

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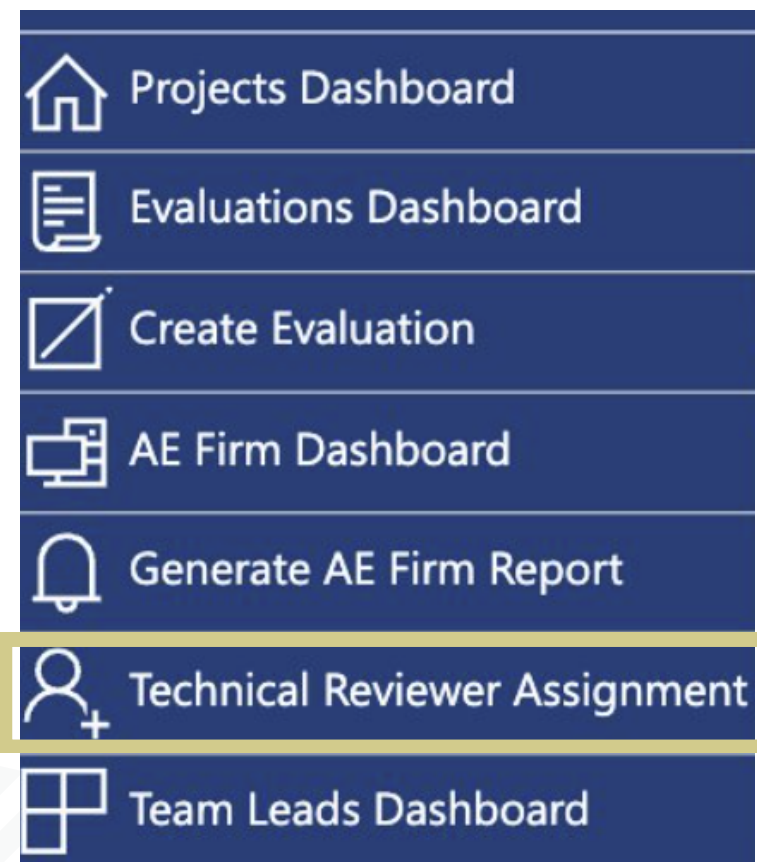
Generate AE Firm Report

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).

A screenshot of the 'A/E Performance Scoring App' interface. The header is dark blue with the app name and a user profile icon. Below the header, there's a title 'Generate Report for A/E firm' and a 'View AE Reports' button. A text box explains: '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.' The main form area contains a label 'Select A/E firm to generate scores report' next to a dropdown menu showing 'Consultant 3'. Below this is a checkbox labeled 'Send the report to AE Firm Rep via email' which is checked. To the right of the checkbox is a text input field containing 'testing@avocado.com'. At the bottom is a yellow button labeled 'Generate AE Report and Email'. Yellow arrows point to the dropdown menu and the 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.



A/E Performance Scoring App

Use this screen to assign Technical Reviewers to a project (All projects will be shown if you are a TL, otherwise only the projects where you are the PM. NOTE: Role assignment review/approval workflow is not developed yet.)

Technical Reviewer Role Assignment for a project

Go to Team Leads Dashboard

Select a Project: pj-1 Test Project1

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

Stoughton, Ryan ADMIN - DOA (Avicado)

Allard, Lewis ADMIN (Avicado)

Enter name or email address

Stoughton, Ryan ADMIN - DOA (Avicado)

Enter name or email address

Architecture

Roofing

Landscape Architecture

Roofing

Interiors

✕

✕

✕

✕

✕

✓ Approved

✓ Approved

✓ Approved

✓ Approved

⚠ Pending review

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

Role Assignments (continued)

A/E Performance Scoring App

Use this screen to assign Technical Reviewers to a project (All projects will be shown if you are a TL, otherwise only the projects where you are the PM.
NOTE: Role assignment review/approval workflow is not developed yet.

Technical Reviewer Role Assignment for a project

Go to Team Leads Dashboard

Select a Project: pj-1 Test Project1

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

Stoughton, Ryan ADMIN - DOA (Avicado)

Allard, Lewis ADMIN (Avicado)

Enter name or email address

Stoughton, Ryan ADMIN - DOA (Avicado)

Enter name or email address

Architecture

Roofing

Landscape Architecture

Roofing

Interiors

🗑️

🗑️

🗑️

🗑️

🗑️

+

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





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 Lead Dashboard: Default View


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


 Projects Dashboard


 Evaluations Dashboard

 Create Evaluation

 AE Firm Dashboard

 Generate AE Firm Report

 Technical Reviewer Assignment

 Team Leads Dashboard

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

Filter or search by Project

Filter or search by Agency

Filter or search by Phase

Filter or Search by User

Sort By

Bluebeam Live

Sort Order

Descending

Reset filters

Count: 3303

Search here


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
1911M	1911M - 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


Note:
pending
resource
assignment
column


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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.


 Projects Dashboard


 Evaluations Dashboard

 Create Evaluation

 AE Firm Dashboard

 Generate AE Firm Report

 Technical Reviewer Assignment

 Team Leads Dashboard

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


Quilling, Evan - DOA


Note: user dropdown


Project #	Project Name	Agency	Phase	Budget	Discipline
Project Manager (2 projects)					
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
Technical Reviewer (6 projects)					
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.


 Projects Dashboard


 Evaluations Dashboard

 Create Evaluation

 AE Firm Dashboard

 Generate AE Firm Report

 Technical Reviewer Assignment

 Team Leads Dashboard

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

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Contact

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