

DFDM (Facilities Development) SharePoint Site Architect/Engineer (A/E) Instructions SharePoint 2013

All Final Review, Bidding, Addenda, Construction, and Record Documents are submitted to DFDM by the Architect/Engineer (A/E) via the Facilities Development SharePoint Site –by loading directly to the project folder. Additionally, select Design Contract Submittal Documents are submitted via the site as well.

The following URL is the link to the new DFDM Site, please add it to your favorites: <https://doa.dfdmdocs.wisconsin.gov/default.aspx>.

Following are procedures for Architect/Engineer (A/E) staff to use when accessing the site for reviewing and uploading documents for Project Manager (PM) review. Please email loadfdadmins@wisconsin.gov with any questions/comments regarding SharePoint procedures.

Summary of Changes from SharePoint 2010 – SharePoint 2013

Remember this is a version upgrade with some minor scope changes. We have designed this site to allow for further development and collaboration opportunities. The documents that are being accepted are the same as in SharePoint 2010. Metadata is being expanded and is being driven by the project information in WisBuild. In addition, we are providing read only access to the WisBuild agency contacts and the DFD construction reps to SharePoint. Key need from A/Es and PMs, make sure to follow the naming conventions to allow proper placement of the documents in the project folder.

We have also added a Temporary File Transfer Library to allow for sharing of documents that are not required of the A/E. For example, these files may include photos, spreadsheets, BIMs, PDFs, and Drawings. This library has been created to replace the previous DFD File Transfer Site.

Documents will be automatically purged after 30 days.

Reminder: Using the correct naming conventions for each document type will allow the A/E to upload or drop the files in one location and SharePoint will automatically (using workflow) place the document into the correct project folder.

Summary of Changes from SharePoint 2010 – SharePoint 2013

SharePoint 2010	SharePoint 2013
Permission to access project folder(s) only	Permission to access main site in addition to project folders
Uploaded files to specific subfolders within project folder	Upload files to single standard folder or 'document set'
	Added a Temporary File Transfer Library

Summary of Documents Uploaded in SharePoint 2013

Document	Section Where Required in AE P&P Manual
Final Commissioning Report	Section 2: Commissioning
Design Report	Section 4: Preliminary Design
Final Review Documents	Section 5: Final Review Phase
Bidding Documents	Section 6: Bidding Phase
Construction Documents	Section 6: Bidding Phase
Supplemental Documents-Addenda	Section 6: Bidding Phase
Record Documents	Section 7: Construction Phase
Final T&B Report	Section 7: Construction Phase
O&M Manuals (Doc Set)	Section 7: Construction Phase
Building Cost Data Report	Section 7: Construction Phase

Site Access

A/E users must register for a State of WI/DOA account to access the DFDM SharePoint Site. Once registered, A/E users will be granted permission to the main site and one or more DFDM project folders as appropriate. **Please note that registration for a State of WI/DOA account is a one-time requirement – for instructions to register, please refer to Appendix 1 of this document.**

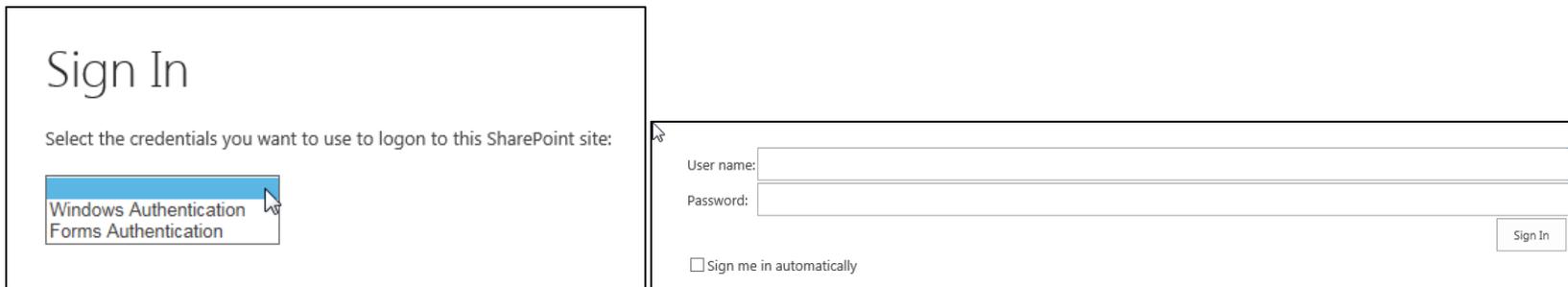
How to Upload Documents to the DFDM SharePoint Site

Step 1: Login to SharePoint

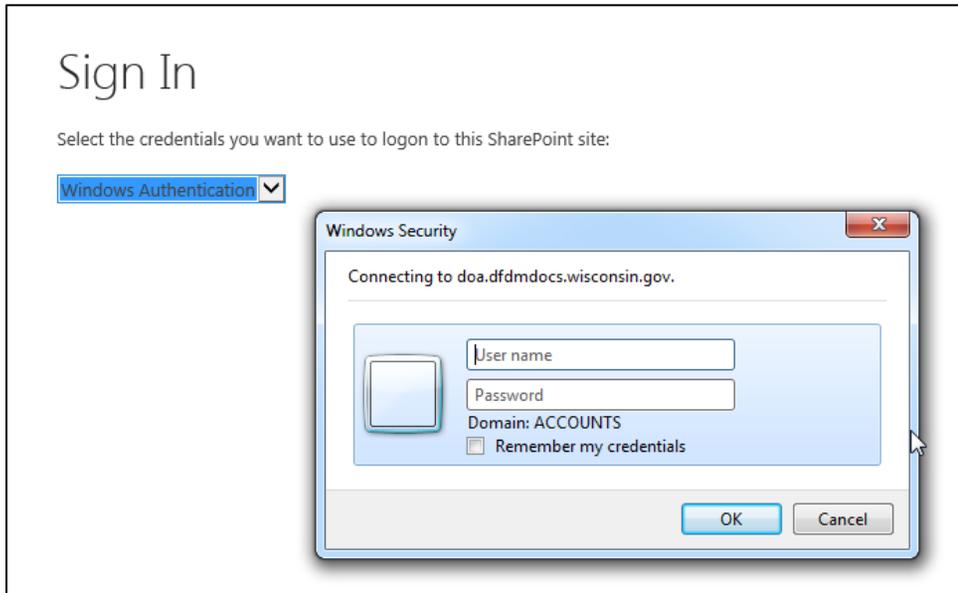
Access the site using the link provided in your 'Welcome to SharePoint' email or by using the following link:

<https://doa.dfdmdocs.wisconsin.gov/default.aspx> . When prompted, enter your State of WI/DOA username/password (see Appendix 1 if you don't have an account). Microsoft Internet Explorer is the preferred browser.

Please note that you must select Forms Authentication (or Windows Authentication if a state agency user) from the drop down and then enter your username and password as shown below:



The screenshot shows the 'Sign In' page. Under the heading 'Sign In', it says 'Select the credentials you want to use to logon to this SharePoint site:'. There are two options: 'Windows Authentication' and 'Forms Authentication'. A mouse cursor is pointing at 'Windows Authentication'. To the right, there is a login form with fields for 'User name:' and 'Password:', a 'Sign In' button, and a checkbox for 'Sign me in automatically'.



This screenshot shows the same 'Sign In' page, but with a 'Windows Security' dialog box overlaid. The dialog box title is 'Windows Security' and it says 'Connecting to doa.dfdmdocs.wisconsin.gov.'. It has fields for 'User name' and 'Password', and a 'Domain: ACCOUNTS' label. There is a checkbox for 'Remember my credentials' which is unchecked. 'OK' and 'Cancel' buttons are at the bottom.

Are you are getting 'Access Denied'?
See tips on next page and if problem persists, send email to: doafdadmins@wisconsin.gov

Are you getting 'Access Denied'?

Please make sure that:

- You are using Internet Explorer.
- You are entering your correct username and password.

Check setting to avoid page caching:

- Check the setting in Internet Explorer under *'Tools', 'Internet Options', 'Browsing history'/'Settings'*, and make sure *'Check for newer versions of stored pages:'* is set to *'Every time I visit the webpage'*.
- Delete all temporary internet files and history.

Add SharePoint to your trusted site list:

- Click the *'Tools'* button, and then click *'Internet Options'*.
- Click the *'Security'* tab, and then click a security zone (*'Local intranet', 'Trusted sites', or 'Restricted sites'*)
- Click *'Sites'*.
- If you clicked Local intranet in the previous step, click *'Advanced'*.
- The website should be shown in the *'Add this website to the zone:'* field. Click Add and enter *'https://webapps.wi.gov'* to the trusted site and save.
If the site is not a secure site (HTTPS), clear the *'Require server verification (https:) for all sites in this zone'* check box.
- Click *'Close'*, and then click *'OK'* (or click OK twice if you clicked Local intranet in step 4).

Also, please confirm you are using the correct password by attempting to log in under *'Profile Management'* on the DOA/State of WI account management page: <https://register.wisconsin.gov>.

Summary of Changes from SharePoint 2010 – SharePoint 2013

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Step 2: Dashboard View

Access is now given at the site collection level in addition to your specific project(s). This means you can now see the main site page even if you have not yet been given permission to a project. This is useful for providing announcements or links to instructional documents. This page will also show you the project folder(s) you have permission to access. To proceed to a specific project folder, just click on its name (WisBuild Project Number).

Division of Facilities Development and Management

Search this site

Home

Libraries

- Project Documents
- SharePoint Instructions
- Temporary File Share

Site Contents

Home

Title

[Welcome to the new DFDM SharePoint Site](#)

In an effort to provide more effective project collaboration, facilities development has upgraded its SharePoint site. We have leveraged many of the new features for increased functionality and enhanced search capability. Please click the 'SharePoint Instructions' library link for updated information.

My Project Folders

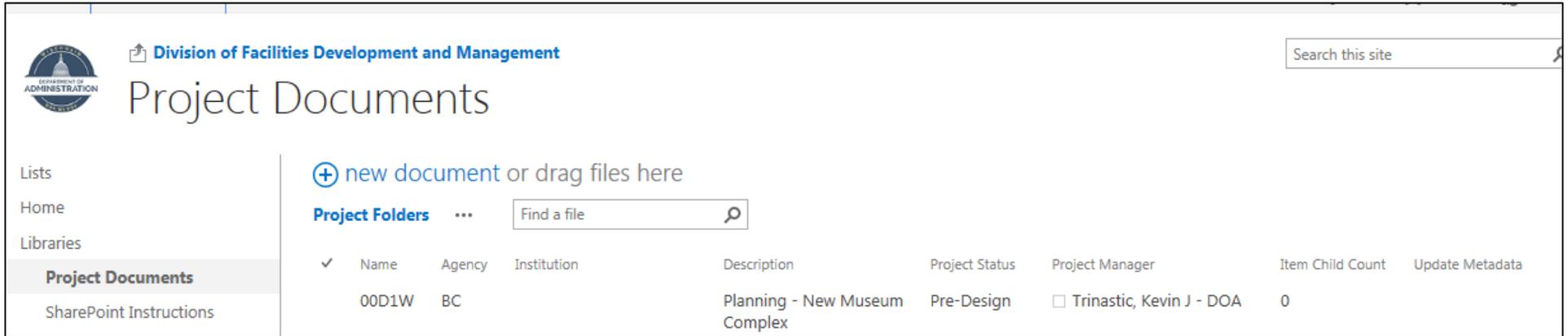
Name	Agency	Description	<input type="checkbox"/> Project Manager	Item Child Count
11G1S	DOC	New Visitors Center	<input type="checkbox"/> Reigstad, Patricia - DOA	16
11A1E	UW	River Falls, Falcon Center	<input type="checkbox"/> Reigstad, Patricia - DOA	13
14C1I	UW	HVAC Replacement	<input type="checkbox"/> Reigstad, Patricia - DOA	0
13A2K	DOC	Mechanical System Study & Repairs	<input type="checkbox"/> Reigstad, Patricia - DOA	0
10H3A	UW	Madison, Student Athlete Performance Ctr	<input type="checkbox"/> Reigstad, Patricia - DOA	0
10C1P	DOT	DSP Statewide Security upgrades	<input type="checkbox"/> Reigstad, Patricia - DOA	0
09A2K	DOA	Capitol Heat and Power Plant Rebuild	<input type="checkbox"/> Reigstad, Patricia - DOA	0

My Documents Pending Review

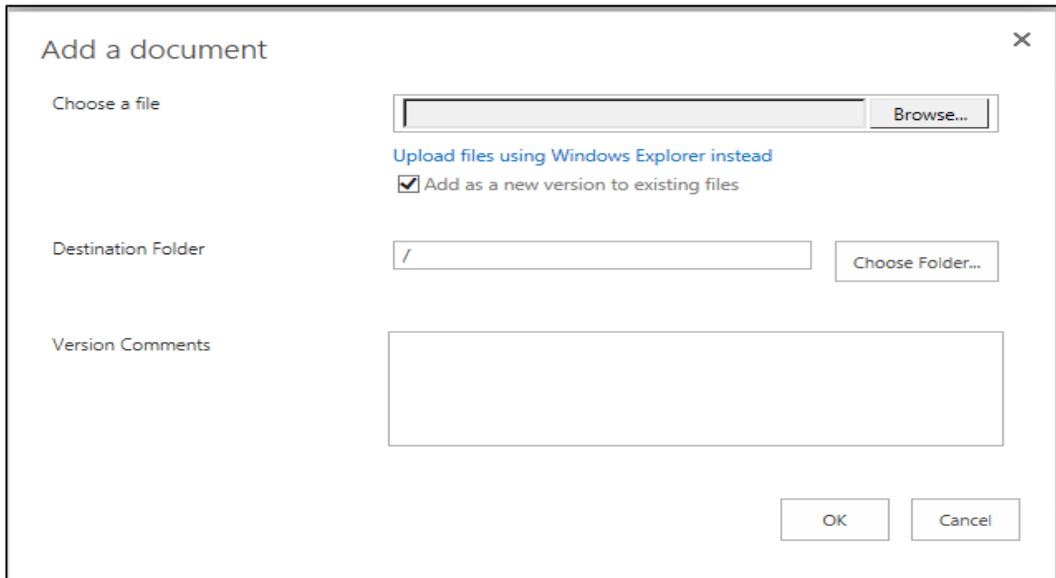
Name	Content Type	Approval Status	Doc Set Link
11A1E-01-FR-Specification-GPCVol1	Final Review Document	Pending Review	Link to Folder
11G1S-00-CD-Specification-Vol1-GPC	Construction Document	Pending Review	Link to Folder
11G1S-00-CD_pdf	Construction Document	Pending Review	Link to Folder
11G1S-00-PR-Specifications GPC	Preliminary Review Document	Pending Corrections	Link to Folder

Step 3: Uploading Files

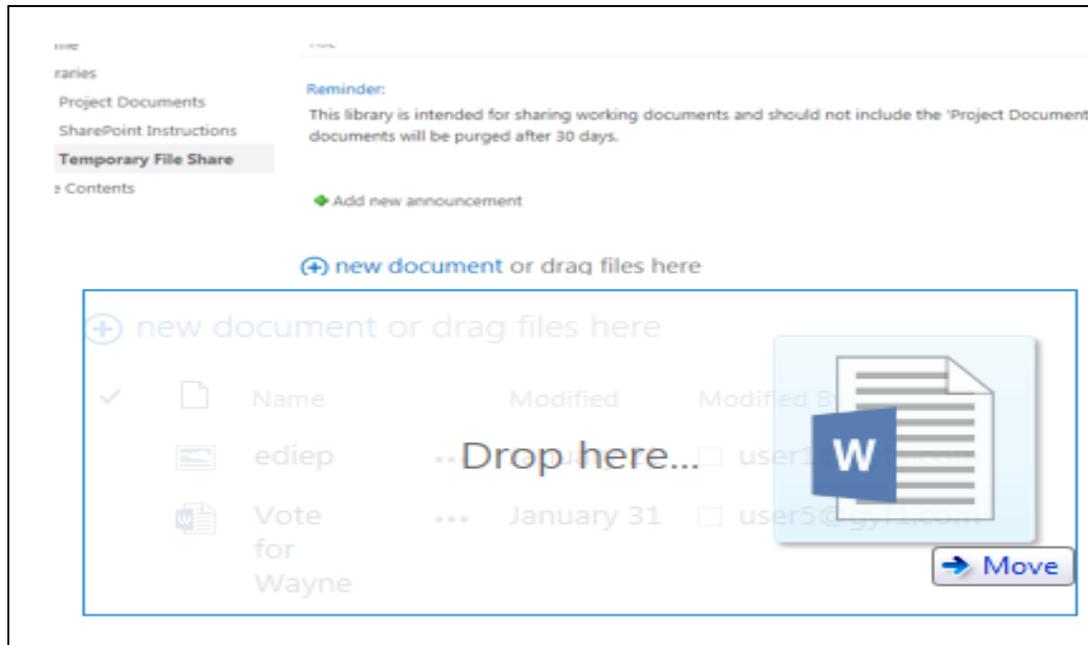
To upload items to the project folder, click on “new document”, select items to be uploaded within a folder on your local PC/network using the Windows Explorer interface, choose the destination folder, and click “ok”. You can also drag & drop files and folders into the project folder in SharePoint.



Click “New Document” and this window will open. Use the browse function to search for the correct document on your computer. Workflow will move the document to the correct scope/phase of the document list based on the naming convention used.



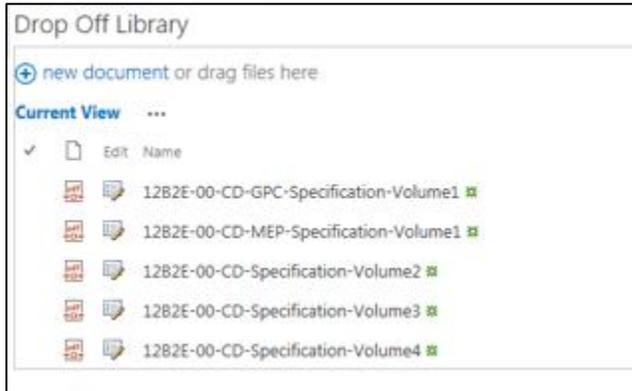
You can also drag and drop files into the project folder:



If you are asked to revise any of the previously uploaded documents, simply repeat step 3 above. Please note that a revised document should use the **same filename as the original** document to utilize version control within SharePoint.

Naming Conventions & Metadata Use

Any uploaded documents which use the correct naming conventions will be routed to the correct project folder/phase based on the document name. Metadata is added to the document based on the WisBuild project information and is automatically “fetched” from WisBuild via workflow. Examples of correctly labeled documents containing accurate metadata:



Examples of how to properly name your SharePoint document

These examples are based on the uniform standard for PDF file naming for drawings sheet number, specifications, addendums and record docs whether or not it is a multi-phase project.

Preliminary Review, Final Review, Bid, Rebid, Phase, Construction, Bid Packages and Addendum Documents submittal set type.

PR = Preliminary Review Documents

FR = Final Review Documents

BD = Bidding Documents

CD = Construction Documents

RD = Record Documents

SD = Supplemental Documents (e.g. Addendum)

Rebid = Rebid Documents

01A1B-00-PR-A001.pdf

01A1B-00-FR-A001.pdf

01A1B-00-BD-MEP Specification Vol 1

01A1B-00-CD-GPC Specification Vol 1

01A1B-00-RD-pdf

01A1B-00-SD-Addendum1.pdf

01A1BRebid-00-BD-Specification Vol 2.pdf

Project Number is 01A1B.

Phase is indicated by “-00-”.

Bidding Document is described by using “BD”.

The type of document is followed up with a written description defining the type of document, e.g. Specification Vol 1 or if a drawing set -pdf or dwg.

Folder Structure

Below you will note a project folder with correctly named documents and you can see how the folder is defined by the different scope or phases of the project. The scope or phase of the project is defined in the A/E Policy and Procedure Manual.

Project Documents · 1112E



1112E
Renovation of Clow Social Science Center

WisBuildProject
 Project Manager
 Const Rep
 Project Status
 Agency
 Institution
 Agency Contact
 AE Firm
 AE
 Building Name
 City
 Country/Region
 Doc Set Link

[1112E](#)
 Hoffmann, Robert L - DOA
 Stuewer, Gary A - DOA
 Subst-Compl
 UW
 OSHKOSH CAMPUS
 Kahler Slater Inc
 CLOW SOCIAL SCIENCE
 CITY OF OSHKOSH
 WINNEBAGO
[Link to Folder](#)

[View All Properties](#)
[Edit Properties](#)

Type	Name	Content Type	Document Type	Approval Status	Created	Created By	Modified	Version
Scope : 4. Prelim Design (2)								
	1112E-00-PR-Design_Report	Preliminary Review Document	None	PM Reviewed	8/25/2017 4:59 PM	System Account	10/12/2017 12:13 PM	26.3
	1112E-00-DR	Design Report	Design Report Summary	Posted	8/26/2017 8:08 PM	System Account	9/13/2017 1:18 PM	21.2
Scope : 6. Bidding (7)								
	1112E-00-BD-Specifications - Volume 2	Bidding Document	Specification	Posted	8/25/2017 4:59 PM	System Account	9/13/2017 11:40 AM	20.2
	1112E-00-BD-Specifications - Volume 3	Bidding Document	Specification	Posted	8/25/2017 4:59 PM	System Account	9/13/2017 12:09 PM	20.2
	1112E-00-BD-Specifications - Volume 4	Bidding Document	Specification	Posted	8/25/2017 4:59 PM	System Account	9/13/2017 11:18 AM	20.2
	1112E-00-CD-Specification - Volume 1 GPC	Construction Document	Specification	Posted	8/25/2017 4:58 PM	System Account	9/13/2017 11:18 AM	20.2
	1112E-00-CD-Specification - Volume 2	Construction Document	Specification	Posted	8/25/2017 4:58 PM	System Account	9/13/2017 11:19 AM	20.2
	1112E-00-CD-Specification - Volume 3	Construction Document	Specification	Posted	8/25/2017 4:58 PM	System Account	9/13/2017 1:18 PM	20.2
	1112E-00-CD-Specification - Volume 4	Construction Document	Specification	Posted	8/25/2017 4:58 PM	System Account	9/13/2017 1:18 PM	21.2
Scope : 7. Construction (5)								
	1112E-00-RD-Specification - Volume 1 GPC	Record Document	Specification	Posted	8/25/2017 4:58 PM	System Account	9/13/2017 1:18 PM	20.2
	1112E-00-RD-Specification - Volume 1 MEFP	Record Document	Specification	Posted	8/25/2017 4:57 PM	System Account	9/13/2017 1:18 PM	20.2
	1112E-00-RD-Specification - Volume 2	Record Document	Specification	Posted	8/25/2017 4:57 PM	System Account	9/13/2017 1:18 PM	20.2
	1112E-00-RD-Specification - Volume 3	Record Document	Specification	Posted	8/25/2017 4:57 PM	System Account	9/13/2017 1:18 PM	20.2
	1112E-00-RD-Specification - Volume 4	Record Document	Specification	Posted	8/25/2017 4:57 PM	System Account	9/13/2017 1:18 PM	20.2

The DFDM Project Manager will be notified via a SharePoint alert once the file(s) have been uploaded.

Please email doafdadmins@wisconsin.gov with any questions/comments regarding this procedure.

Appendix 1: Register for a username/password on <https://register.wisconsin.gov>.

In order to access the DFDM SharePoint File Transfer site, Architects/Engineers must create a State of Wisconsin/DOA account from this site - <https://register.wisconsin.gov>. Once registered, AE's will be provided a DOA credential under the Wisconsin External (wiext) domain. This account is intended to provide users with access to multiple State of Wisconsin web applications, including the DFDM SharePoint site.

Use the 'Self Registration' link

DOA/Wisconsin Logon Management System

The DOA/Wisconsin Logon Management System allows authorized individuals to access many DOA Internet applications using a single ID and password. When access to information or services is restricted to protect your privacy or the privacy of others, you will be asked to provide your DOA/Wisconsin Logon and password. Your DOA/Wisconsin Logon and password verifies your identity so that we can provide you with access to your information and services and prevent access by unauthorized individuals.

User Acceptance Agreement

Please note that only certain types of information will be stored in your user profile, as described in the [User Acceptance Agreement](#). Your user profile will never contain records such as driving history, tax information, unemployment compensation, vehicle registrations or prison records.

Sign Up for your DOA/Wisconsin Logon

[Self Registration](#) (Request a DOA/Wisconsin Logon and Password.)

Self Registration allows you to create **your personal** DOA/Wisconsin Logon. This is your key to doing secure business with DOA over the Internet.

Change / Update Your Information

[Profile Management](#) allows you to change your account information, e-mail address and other information.

Change Your Password

[Password Management](#) allows you to change your password.

Forgot Your Logon ID or Password?

[Logon ID/Password Recovery](#) allows you to recover a forgotten DOA/Wisconsin Logon and/or Password.

Updated February 9, 2011
DET - Bureau of Business Applications Services
Content Contact: [BBAS/BA](#)

Customer ID Menu

- :: [Self Registration](#)
- :: [Profile Management](#)
- :: [Password Management](#)
- :: [Forgot your account information?](#)
- :: [User Acceptance Agreement](#)
- :: [SharePoint Registration Help](#)

Not sure if you already have DOA/State of WI account?

Use the 'Profile Management' or 'Login ID/Password Recovery' link to check

[Wisconsin.gov](#) | [Search](#) | [Legal](#) | [DOA Home](#)

Accept the user agreement, complete the 'Account Creation' form and indicate 'SharePoint' under the section entitled, 'Systems You Will Access'.

Account Creation
* Indicates Required Field

Profile Information

First Name *

Middle Initial

Last Name *

Suffix

E-Mail *

Phone Use this format 6085551234 ext.

Mailing Address

Street Address

City

State/Province

Zip Code -

Systems You Will Access
Use your mouse to highlight the system that you want to access.

Systems *

Account Information
Your Logon ID must be between 5-20 characters and **CAN** be a combination of letters and numbers. Your Logon ID must not contain spaces or special characters.

Logon ID *

Your Password must be 7-20 characters long and **MUST** contain a combination of letters and either numbers or special characters (except the @ ? / signs). Passwords are case sensitive. Your Password cannot contain the Logon ID.

[Password Tips](#)

Password *

Re-enter Password *

Logon ID/Password Recovery
Enter a question and answer for use if you forget your DOA/Wisconsin Logon ID or Password. Your Secret Question and Secret Answer cannot contain your password.

[Secret Question and Answer Tips](#)

Secret Question *

Secret Answer *

Verification
This step helps prevent automated registrations.
If you cannot see the number below [click here](#).

Please enter the number as it is shown in the box to the left. *



Once registered, send an email to doadfdadminservices@wisconsin.gov so that you may be given access permission to the appropriate project folder within DFDM's SharePoint site. Be sure to include your **account username** and the **project number** in your message. Once you have been granted permission, you should receive an automated 'Welcome to SharePoint' email.