

## DFDM (Facilities Development) SharePoint Site Project Manager 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>. PM login to SharePoint is automatic. However, if prompted, select “Windows Authentication” from the drop down and use your IAM username/password.

Following are procedures for Facilities Development Project Managers to use when accessing the site for reviewing and approving documents uploaded by the A/E. Please email [doadfdadmins@wisconsin.gov](mailto:doadfdadmins@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.

\*\*\*Using the correct naming conventions for each document type will allow the PM to upload or drop the files in one location and Sharepoint will automatically (using workflow) place the document into the correct project folder.

SharePoint 2010	SharePoint 2013
Upload files to single standard folder or ‘document set’	Upload or Drag and Drop files into Project Folder
Upload single zip folder containing drawing files	Upload or Drag and Drop files into Project Folder
Uploaded individual drawing files	Upload or Drag and Drop files into Project Folder

## Summary of Documents Stored in SharePoint 2013

<b>Document</b>	<b>Section Where Required in AE P&amp;P Manual</b>
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

## Project Folder and Folder Permissions

- BCBCA staff will create the new project folder in SharePoint. Project folders are established when the AE contract is executed. If you need the folder created prior to that time, please inform Admin Services and they will create it. If there is no design contract, the creation of a bid date or direct request from the PM will also serve this function.
- The folder will inherit metadata from WisBuild. Workflow will run to incorporate many key elements that are stored in WisBuild thereby allowing for additional search capabilities and data usage. Prime A/E, Agency Contact and the assigned Construction Rep will be given access to the project folder; A/E has contribute access and the agency contact and construction rep have read only access.
- The default project folder structure in SharePoint is shown below:

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
<b>Scope : 4. Prelim Design (2)</b>								
	<a href="#">1112E-00-PR-Design_Report</a>	Preliminary Review Document	None	PM Reviewed	8/25/2017 4:59 PM	<input type="checkbox"/> System Account	10/12/2017 12:13 PM	26.3
	<a href="#">1112E-00-DR</a>	Design Report	Design Report Summary	Posted	8/26/2017 8:08 PM	<input type="checkbox"/> System Account	9/13/2017 1:18 PM	21.2
<b>Scope : 6. Bidding (7)</b>								
	<a href="#">1112E-00-BD-Specifications - Volume 2</a>	Bidding Document	Specification	Posted	8/25/2017 4:59 PM	<input type="checkbox"/> System Account	9/13/2017 11:40 AM	20.2
	<a href="#">1112E-00-BD-Specifications - Volume 3</a>	Bidding Document	Specification	Posted	8/25/2017 4:59 PM	<input type="checkbox"/> System Account	9/13/2017 12:09 PM	20.2
	<a href="#">1112E-00-BD-Specifications - Volume 4</a>	Bidding Document	Specification	Posted	8/25/2017 4:59 PM	<input type="checkbox"/> System Account	9/13/2017 11:18 AM	20.2
	<a href="#">1112E-00-CD-Specification - Volume 1 GPC</a>	Construction Document	Specification	Posted	8/25/2017 4:58 PM	<input type="checkbox"/> System Account	9/13/2017 11:18 AM	20.2
	<a href="#">1112E-00-CD-Specification - Volume 2</a>	Construction Document	Specification	Posted	8/25/2017 4:58 PM	<input type="checkbox"/> System Account	9/13/2017 11:19 AM	20.2
	<a href="#">1112E-00-CD-Specification - Volume 3</a>	Construction Document	Specification	Posted	8/25/2017 4:58 PM	<input type="checkbox"/> System Account	9/13/2017 1:18 PM	20.2
	<a href="#">1112E-00-CD-Specification - Volume 4</a>	Construction Document	Specification	Posted	8/25/2017 4:58 PM	<input type="checkbox"/> System Account	9/13/2017 1:18 PM	21.2
<b>Scope : 7. Construction (5)</b>								
	<a href="#">1112E-00-RD-Specification - Volume 1 GPC</a>	Record Document	Specification	Posted	8/25/2017 4:58 PM	<input type="checkbox"/> System Account	9/13/2017 1:18 PM	20.2
	<a href="#">1112E-00-RD-Specification - Volume 1 MEFP</a>	Record Document	Specification	Posted	8/25/2017 4:57 PM	<input type="checkbox"/> System Account	9/13/2017 1:18 PM	20.2
	<a href="#">1112E-00-RD-Specification - Volume 2</a>	Record Document	Specification	Posted	8/25/2017 4:57 PM	<input type="checkbox"/> System Account	9/13/2017 1:18 PM	20.2
	<a href="#">1112E-00-RD-Specification - Volume 3</a>	Record Document	Specification	Posted	8/25/2017 4:57 PM	<input type="checkbox"/> System Account	9/13/2017 1:18 PM	20.2
	<a href="#">1112E-00-RD-Specification - Volume 4</a>	Record Document	Specification	Posted	8/25/2017 4:57 PM	<input type="checkbox"/> System Account	9/13/2017 1:18 PM	20.2

## Notification of New Documents to Review

- An alert from the SharePoint will be sent via e-mail to the PM when the A/E uploads new or revised documents into SharePoint.

Wed 9/13/2017 1:24 PM

 Division of Facilities Development and Management <sp2013@wisconsin.gov>

**\*Test\* DFDM SharePoint Alert: New Document Under 15J1Y**

To  Beasley, Audrey - DOA

Cc  Vingelen, John - DOA

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A new document has been uploaded to the DFDM \*TEST\* SharePoint site with the details below:

Name: 15J1Y-00-SD-Addendum1.pdf  
Uploaded By: Vingelen, John - DOA  
Modified By: SharePoint App  
Type: Supplemental Document  
Version: 0.4  
Size: 1688374  
Uploaded On: 9/13/2017

[Link to Project Folder](#)  
[Link to Document](#)

- Each PM now has a section indicating they have documents that need to be reviewed. These are found in the, “My Documents Pending Review” section of the landing page. Once documents have been marked as reviewed they will be moved to the project folder via workflow.

The screenshot shows a SharePoint site for the Division of Facilities Development and Management. The page includes a navigation menu on the left, a search bar, and a welcome message. Below the welcome message, there are two tables: 'My Project Folders' and 'My Documents Pending Review'. The 'My Documents Pending Review' table is circled in red.

Name	Agency	Description	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

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

- Please do NOT rely entirely on SharePoint notifications for confirming that documents have been transferred – direct e-mail communication with the A/E is recommended.

## Document Review

- The PM should review all documents uploaded to SharePoint. E-mail the A/E directly with any requested revisions. Click on the document to open and view it. There is a drop down list of other actions for the document in pending review status. Please note: There is no need to check the document out. If a new document is uploaded with the same title, it will supersede the previous version. This change can be tracked by using the version history tool.

The screenshot shows a SharePoint interface titled "My Documents Pending Review". It displays a table of documents with columns for Name, Content Type, Approval Status, and Doc Set Link. A red arrow points to the dropdown arrow in the Content Type column of the first row. A context menu is open over this dropdown, listing various actions such as View Properties, Edit Properties, Check Out, Convert to PDF, Download as PDF, Publish a Major Version, Version History, Compliance Details, Workflows, View Workflow History, and Schedule Workflows. Below the table, there is a "Final Status" dropdown menu and a table of users with checkboxes for approval.

Name	Content Type	Approval Status	Doc Set Link
13A3B-00-BD-pdf	Bidding Document	Pending Review	<a href="#">Link to Folder</a>
13A	Bidding Document	Pending Review	<a href="#">Link to Folder</a>

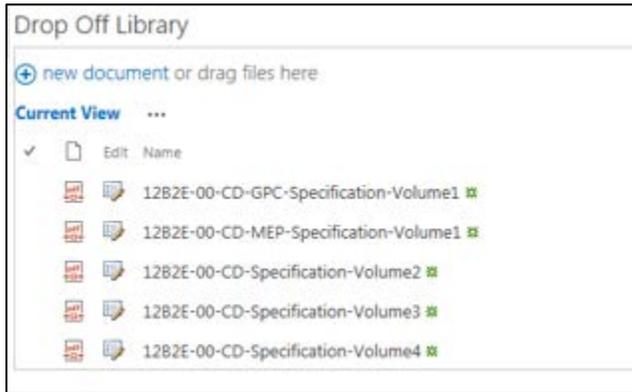
Final Status

Approval Status	Project Manager	Doc Set Link
Pending Review	<input checked="" type="checkbox"/> Keasler, Ed - DOA	<a href="#">Link to Folder</a>
PM Reviewed	<input checked="" type="checkbox"/> Hoffmann, Robert L - DOA	<a href="#">Link to Folder</a>

## Naming Conventions & Metadata Use

Any uploaded documents which use the correct naming conventions will be routed to the correct 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.

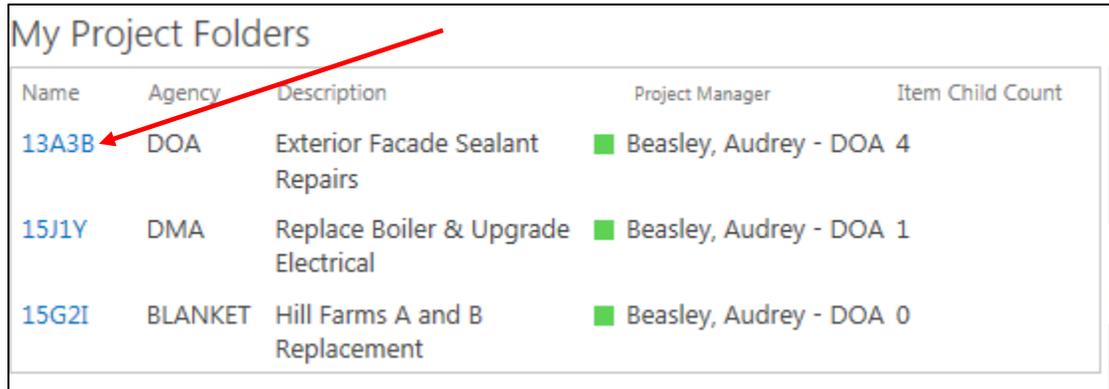
Phase is indicated by “-00-”.

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.

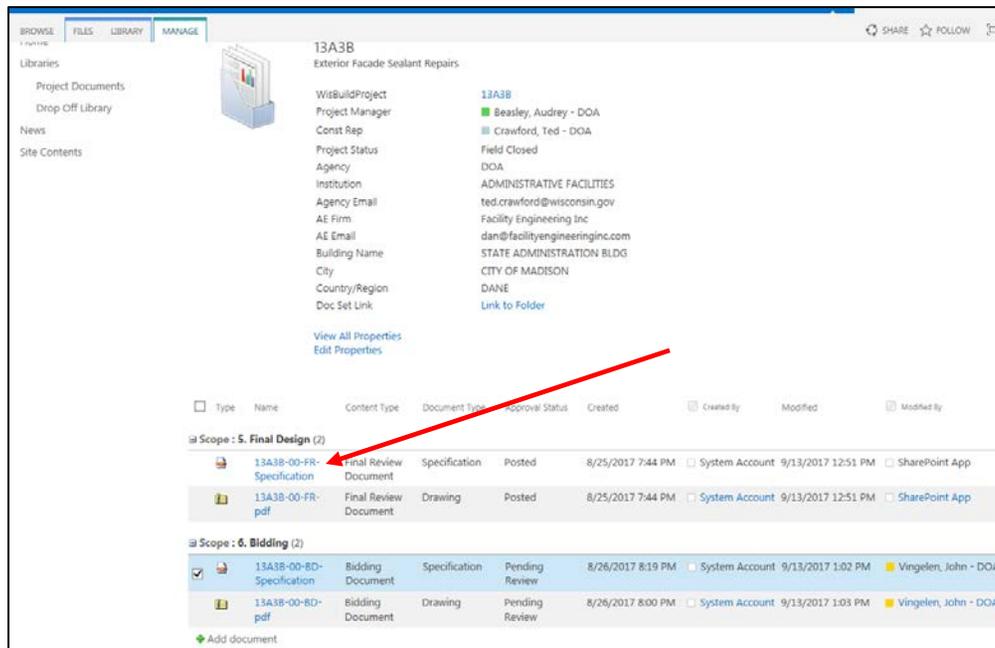
## Changing the 'Approval Status' of a Document Set or Individual Document

Once the PM has reviewed the documents that were pending review and linked them successfully to a project folder, they then have the opportunity to change the approval status by selecting the project from "My Project Folders".



Name	Agency	Description	Project Manager	Item Child Count
13A3B	DOA	Exterior Facade Sealant Repairs	■ Beasley, Audrey - DOA	4
15J1Y	DMA	Replace Boiler & Upgrade Electrical	■ Beasley, Audrey - DOA	1
15G2I	BLANKET	Hill Farms A and B Replacement	■ Beasley, Audrey - DOA	0

Then select the drop down next to the document. Select 'Edit Properties' from the dropdown menu.



13A3B  
Exterior Facade Sealant Repairs

Project Manager: ■ Beasley, Audrey - DOA  
Const Rep: ■ Crawford, Ted - DOA  
Project Status: Field Closed  
Agency: DOA  
Institution: ADMINISTRATIVE FACILITIES  
Agency Email: ted.crawford@wiscconsin.gov  
AE Firm: Facility Engineering Inc  
AE Email: dan@facilityengineeringinc.com  
Building Name: STATE ADMINISTRATION BLDG  
City: CITY OF MADISON  
Country/Region: DANE  
Doc Set Link: Link to Folder

View All Properties  
Edit Properties

Type	Name	Content Type	Document Type	Approval Status	Created	Created By	Modified	Modified By
Scope : 5. Final Design (2)								
	13A38-00-FR-Specification	Final Review Document	Specification	Posted	8/25/2017 7:44 PM	System Account	9/13/2017 12:51 PM	SharePoint App
	13A38-00-FR-pdf	Final Review Document	Drawing	Posted	8/25/2017 7:44 PM	System Account	9/13/2017 12:51 PM	SharePoint App
Scope : 6. Bidding (2)								
	13A38-00-BD-Specification	Bidding Document	Specification	Pending Review	8/26/2017 8:19 PM	System Account	9/13/2017 1:02 PM	Vingelen, John - DOA
	13A38-00-BD-pdf	Bidding Document	Drawing	Pending Review	8/26/2017 8:00 PM	System Account	9/13/2017 1:05 PM	Vingelen, John - DOA

◆ Add document

Click on the drop down menu next to the Approval Status field. Choose the appropriate status to update the field. Then click 'Save'.

Content Type	Bidding Document	▼
Name *	13A3B-00-BD-Specification	.pdf
Title		
Document Type	Specification	▼
Phase	6. Bidding	▼
Project Manager	■ Beasley, Audrey - DOA x	
Doc Set Link	Type the Web address: <a href="#">(Click here to test)</a> https://shareuat.agency.wisconsin.gov/sites/dsf/Project%20Docume	
	Type the description: Link to Folder	
Agency	DOA	
Institution	ADMINISTRATIVE FACILITIES	
Approval Status	PM Reviewed	▼
Building Name	STATE ADMINISTRATION BLDG	
WisBuildProject	13A3B	▼
Building Number		
	DSF Building Number	
Version: 25.3		
Created at 8/26/2017 8:19 PM	by <input type="checkbox"/> System Account	
Last modified at 9/13/2017 1:02 PM	by <input checked="" type="checkbox"/> Vingelen, John - DOA	





# Temporary File Share Library

The use of the Temporary File Share Library is intended to give project managers, agency staff, and A/Es the ability to share project documents that are not required by the Policy and Procedure Manual. These documents have a 30-day life and will be deleted after that time. It may be best to create a folder for the documents and upload into that folder rather than have them live at the highest level.

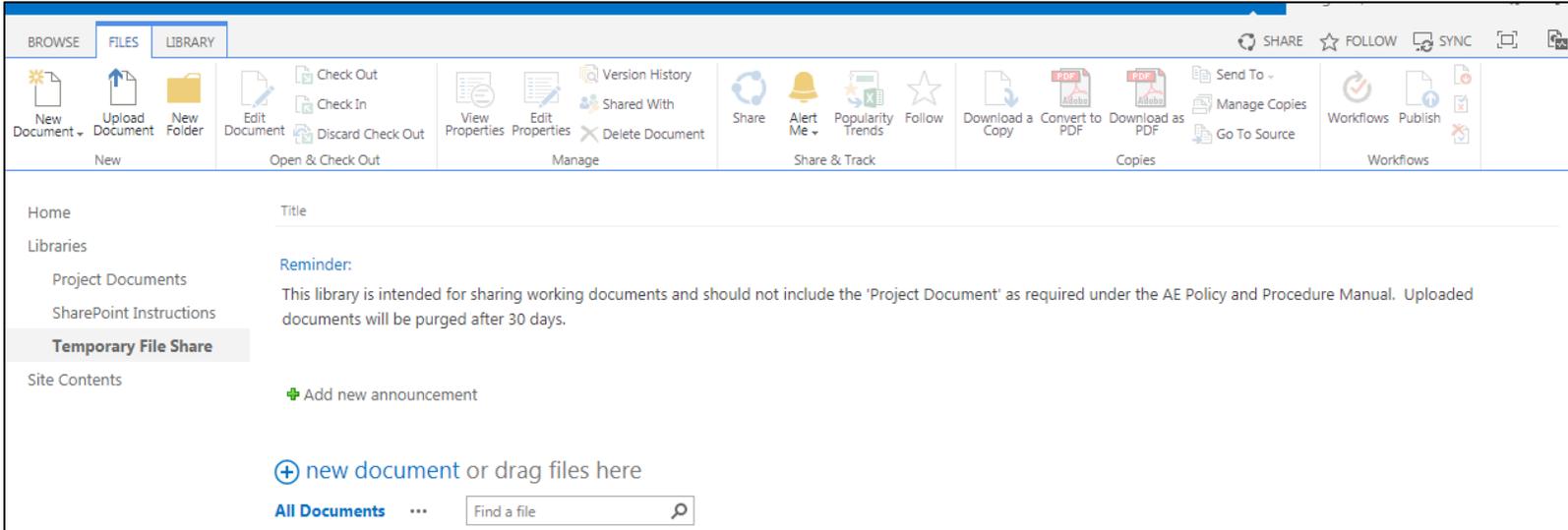
Please note: these documents are available to any person with access to this SharePoint site. This is different than project related documents, as those are available only to those people assigned to the project.

The screenshot shows a SharePoint site for the 'Division of Facilities Development and Management'. The page title is 'Temporary File Share'. On the left, there is a navigation pane with 'Libraries' expanded, showing 'Project Documents', 'SharePoint Instructions', and 'Temporary File Share' (which is selected). Below the navigation pane, there are 'Home' and 'Site Contents' links. The main content area features a 'Reminder' message: 'This library is intended for sharing working documents and should not include the 'Project Document' as required under the AE Policy and Procedure Manual. Uploaded documents will be purged after 30 days.' Below the reminder is an 'Add new announcement' button. A large blue area contains a '+ new document or drag files here' prompt. Underneath is a search bar labeled 'All Documents' with the text 'Find a file'. A table lists the documents in the library:

Name	Title	Created	Created By
15I1B-00-FR-Plans	...	A few seconds ago	Reigstad, Patricia - DOA
09H2L	09H2L	About a minute ago	Reigstad, Patricia - DOA
WIMR Drawings	...	About an hour ago	Reigstad, Patricia - DOA
UW-Stout Price Commons ASHRAE 62.1 RPB2 Heating	...	About an hour ago	Reigstad, Patricia - DOA
Pre-Design Report 20150722_FINAL_8.5.2015	14E20	2 hours ago	Reigstad, Patricia - DOA
Drawing set	10A1J	3 hours ago	Reigstad, Patricia - DOA
20161202_133417	161206 Roof Failure	3 hours ago	Reigstad, Patricia - DOA

## How to Create a Folder in the Temporary File Share Library

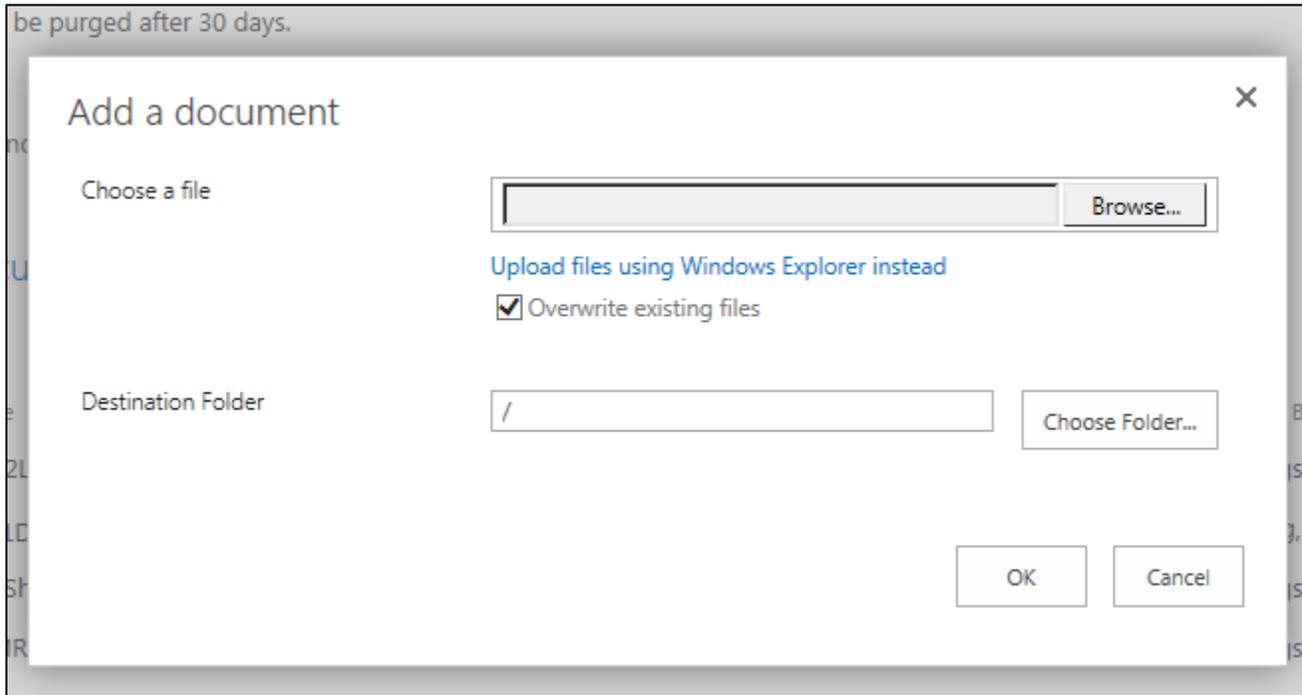
You can also create a folder if you have multiple documents pertaining to a given project and upload them in that folder. To create a folder, select 'New Folder' in the toolbar and name it appropriately.



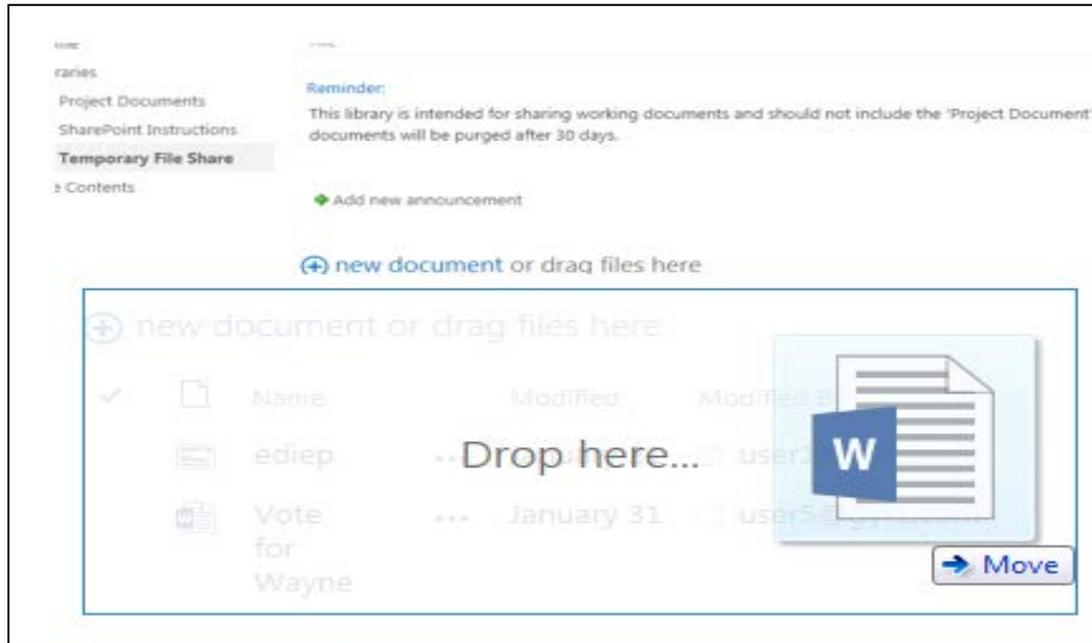
## How to Add a Document

Click on “new document”

Add a document window will open. Browse and search for your document to add. Choose a destination folder. Click “okay”. Workflow will run and add the document to the library page.



You can also “drag and drop” a document into a folder or into this library.



## Sharing Files

Once you have uploaded the documents, check the document and then select 'share' from the toolbar.

The screenshot displays a SharePoint document library interface. At the top, there are tabs for 'Open & Check Out', 'Manage', 'Share & Track', and 'Copies'. Below the tabs, a 'Title' field is visible. A 'Reminder' section states: 'This library is intended for sharing working documents and should not include the 'Project Document' as required under the AE Policy and Procedure M documents will be purged aft...'. There is a '+ Add new announcement' button and a '+ new document' button. The 'All Documents' section lists several files, with '15I1B-00-FR-Plans' selected. A 'Share' dialog box is open over the selected document. The dialog box has a title 'Share '15I1B-00-FR-Plans'' and a close button. It shows 'Shared with lots of people' and an 'Invite people' section. The 'Invite people' section includes a text input field with the placeholder 'Enter names, email addresses, or 'Everyone''.', a 'Can edit' dropdown menu, and a text area for a personal message with the placeholder 'Include a personal message with this invitation (Optional)'. Below the text area is a 'SHOW OPTIONS' link. At the bottom of the dialog box are 'Share' and 'Cancel' buttons. The background document library shows a list of documents with columns for 'Name', 'Created By', and 'Created'. The 'Created By' column lists 'Reigstad, Patricia - DOA' for several documents.

\*\*\*Please email [doadfdadmins@wisconsin.gov](mailto:doadfdadmins@wisconsin.gov) with any questions/comments regarding SharePoint procedures.