Architect/Engineer (A/E) Instructions

Uploading Documents to the DFD File Transfer Site in Microsoft SharePoint.

All Design Report, Final Review, Bidding, Addenda, Construction and Record Documents are to be submitted to DFD by the Architect/Engineer (A/E) via the **DFD File Transfer Site**. Additionally, select Design Contract Submittal Documents are submitted via the site as well. The DFD File Transfer Site is a secure, web based site powered by Microsoft SharePoint.

Summary of Documents Uploaded in SharePoint 2010

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

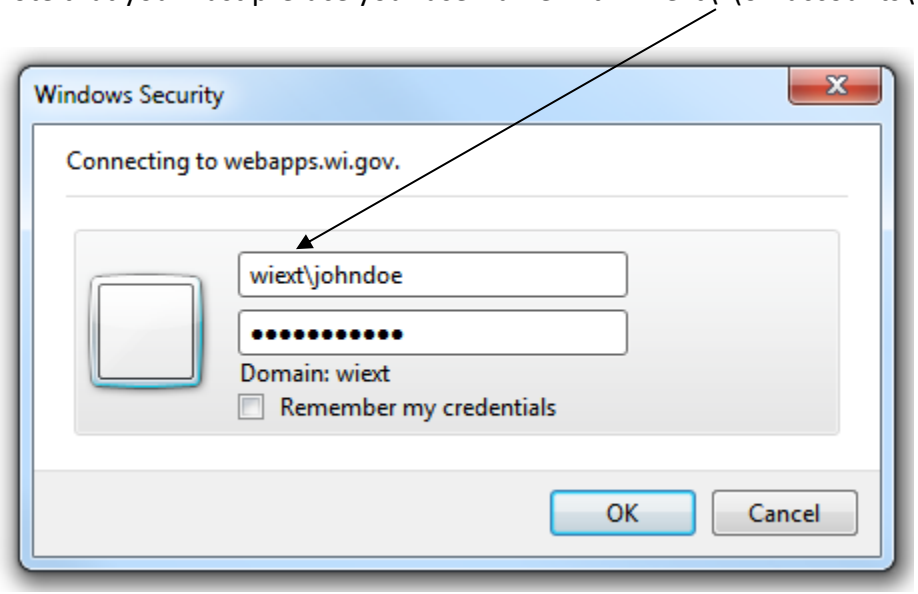
A/E users must register for a State of WI/DOA account to access the DFD File Transfer Site. Once registered, A/E users will be granted permission to the main site and one or more DFD project folders as appropriate. **Please note that registration for a State of WI/DOA account is a one-time requirement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

Below are the steps for uploading documents to the DFD File Transfer 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://webapps.wi.gov/sites/dsf/filetransfer. 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 preface your username with 'wiext\' (or 'accounts\' if a state agency user) per the screen capture below:



Are you are getting 'Access Denied'?

See tips on next page and if problem persists, send email to: doadfdadminservices@wisconsin.gov

Are you getting 'Access Denied'?

Please make sure that:

- You are using Internet Explorer.
- You are entering 'wiext\' in front of your username.

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).

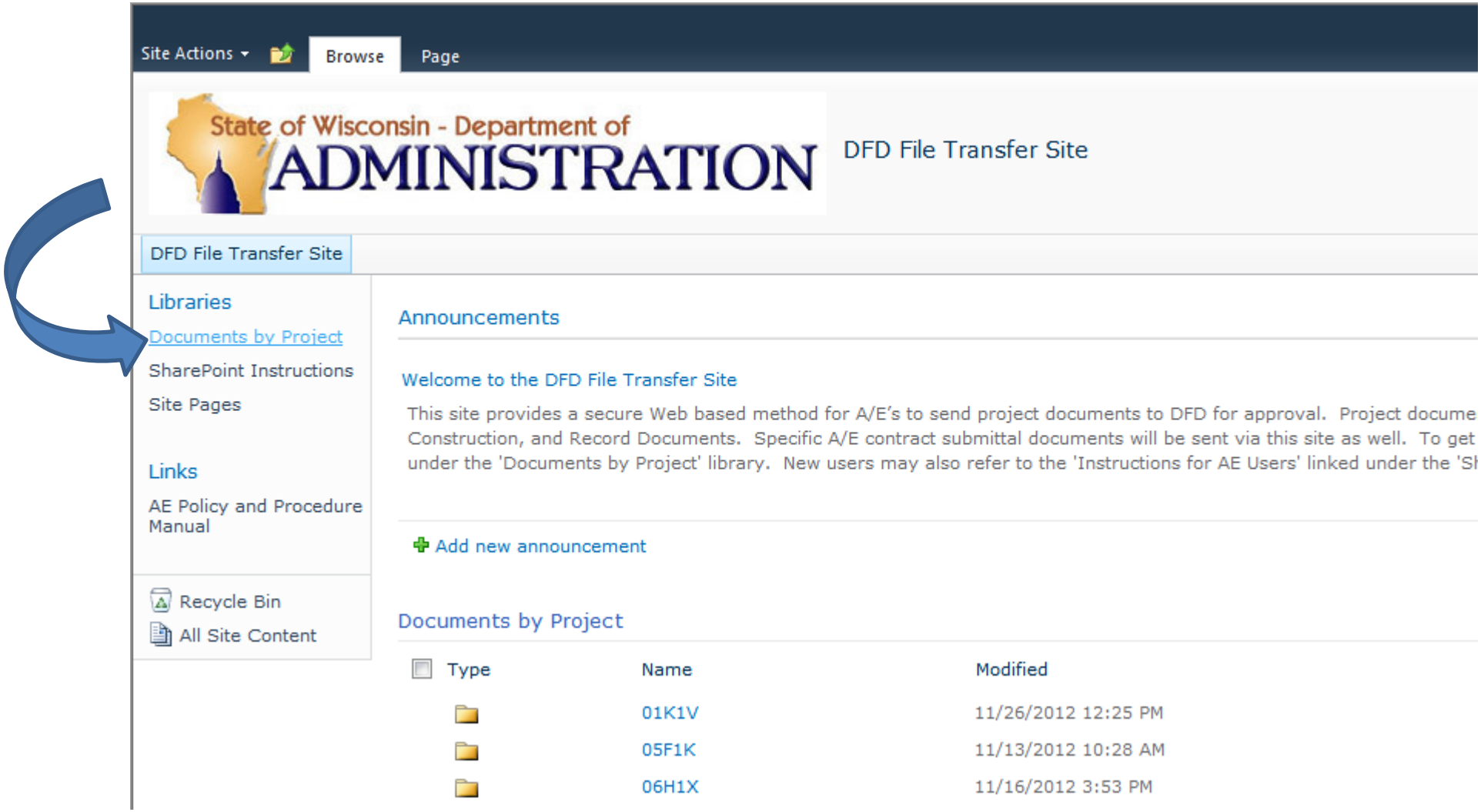
Also, please confirm you are using the correct password by attempting to log in under *'Profile Management'* on the DOA/State of WI account management page: https://register.wisconsin.gov.

Summary of Changes from SharePoint 2007 – SharePoint 2010

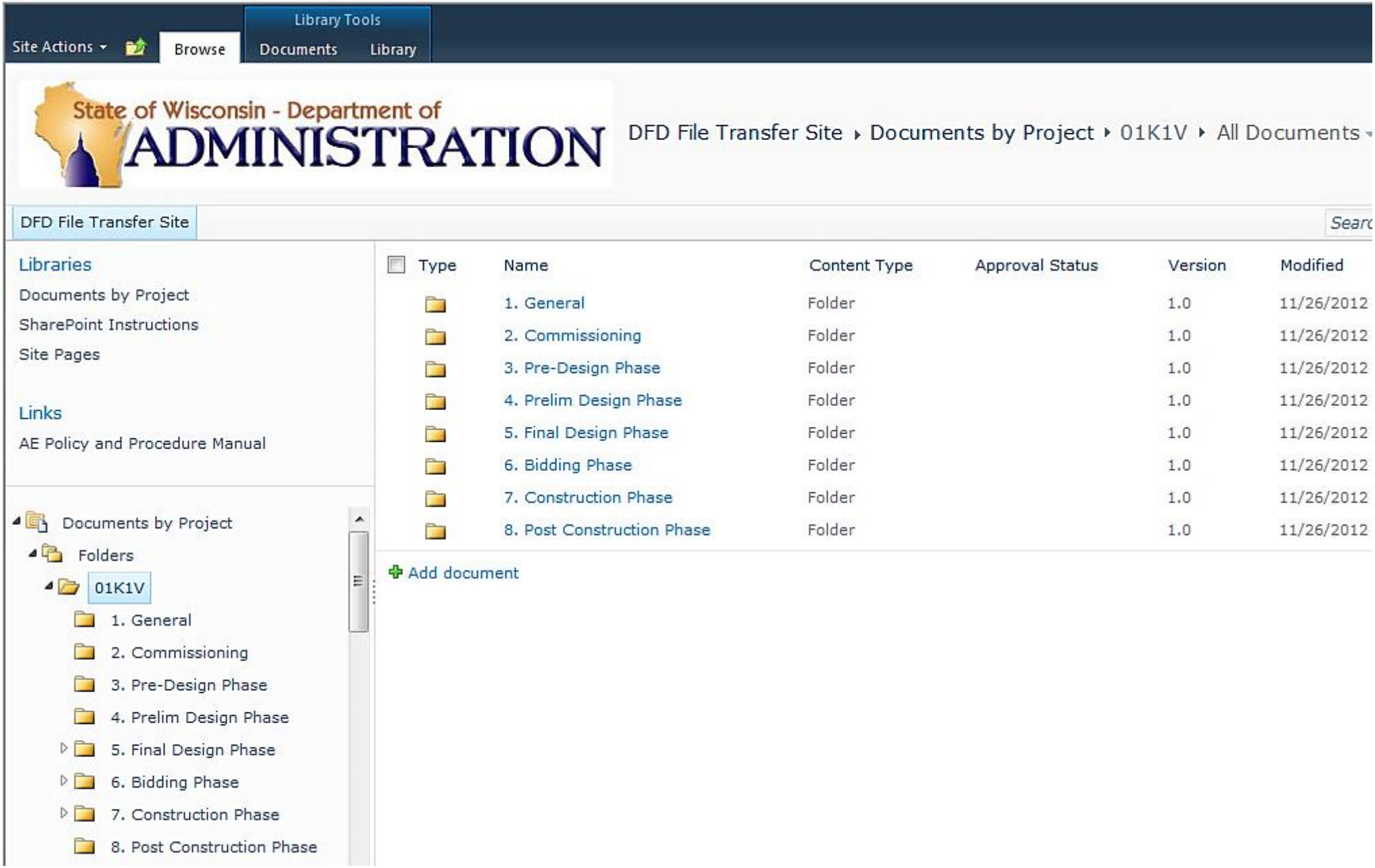
SharePoint 2007	SharePoint 2010
Permission to access project folder(s) only	Permission to access main site in addition to project folders
Uploaded files to specific subfolders within project folder	Upload files to single standard folder or 'document set'
Uploaded individual drawing files	Upload single zip folder containing drawing files
Uploaded final review, bidding, addenda & construction docs only	Additionally upload design report, CxP documentation & record docs

Step 2: Locate the Destination Folder for your Upload

Access is now given at the site level in addition to your specific project folder(s). This means you can now see the main site page even if you have not yet been given permission to a project folder. 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, click *'Documents by Project'* on the left side of the screen. To open a project folder, just click on its name.



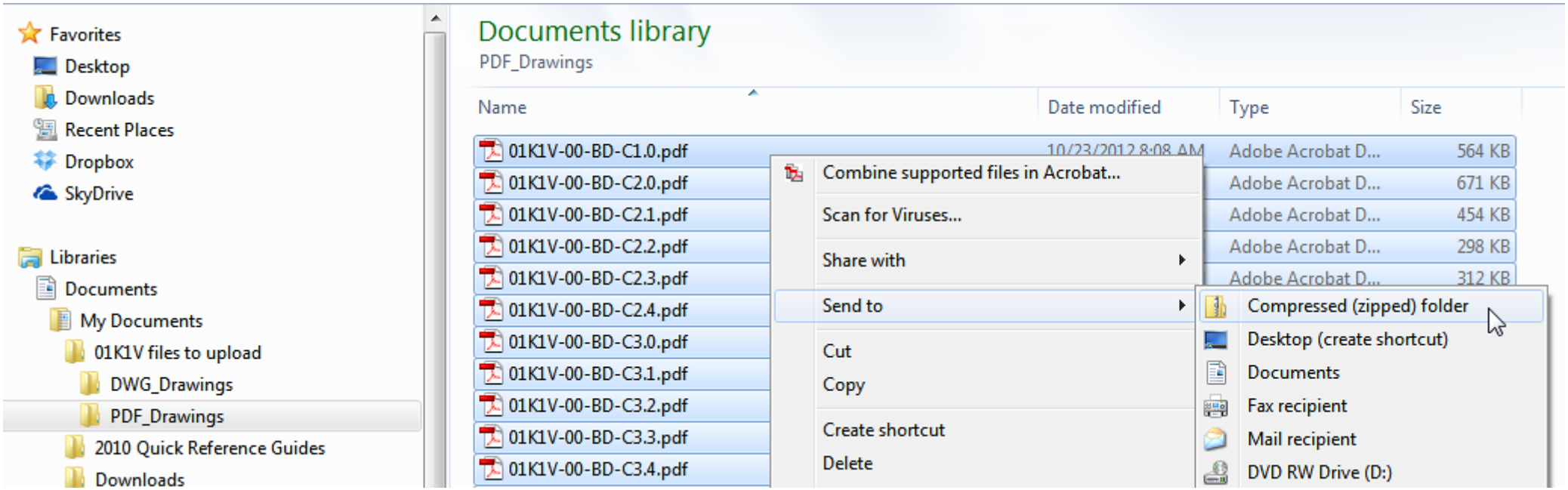
Once you have navigated to the project folder, click on the appropriate folder for your upload type. Click *'5. Final Design Phase'* to upload final review documents. Click *'6. Bidding Phase'* to upload addenda, bidding or construction documents. Click *'7. Construction Phase'* to upload O&M manuals and record documents.



Step 3: Creating Compressed Folder(s) of Drawing Files

We require all drawings to be in a compressed folder(s) before uploading to SharePoint. Please create a zip folder for the PDF drawings as follows: *(Note - repeat this step to include DWG drawings when required.)*

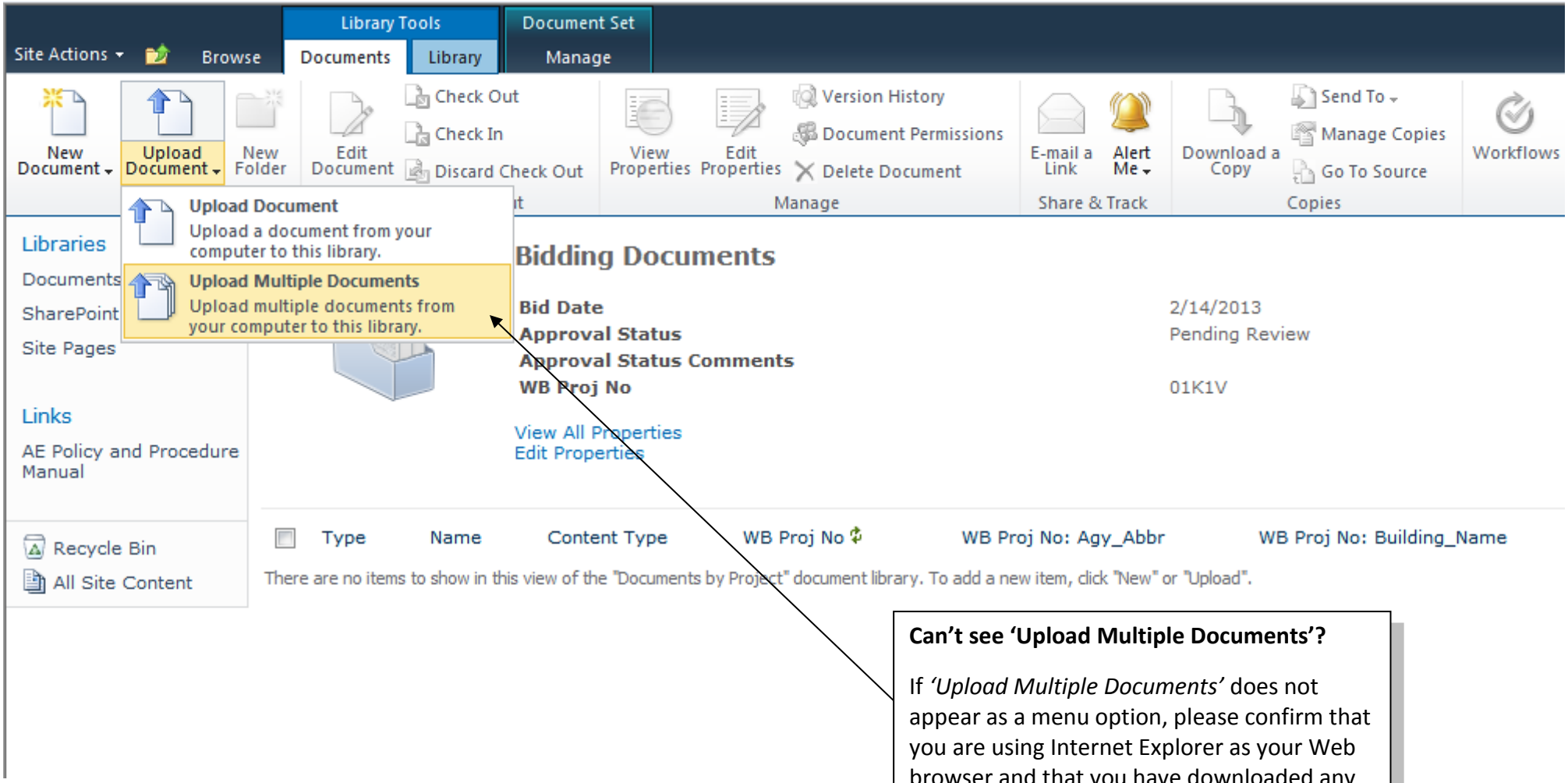
- Select all the PDF drawing files if there are no volumes. If you have separate volumes, make each volume its own compressed folder.
- Right-click selection and choose *'Send to' – 'Compressed (zipped) folder'.*
- Name the zip folder '**01K1V-00-BD-pdf'** or **'01K1V-00-BD-pdf Vol_1 (2, 3, etc.)** *(use your specific project number/phase number/drawing type)*
- **Record docs only**: both DWG and PDF drawings are required. The zip folders are to be named '**01K1V-00-RD-dwg'**, and '**01K1V-00-RD-pdf'**. Keep volumes separate as with bidding documents.



You are encouraged to use the compression utility that is included in the Windows operating system. There is no need to install a third party zip utility. Once you have your PDF specification document as well as a zip folder(s) containing all of your drawings, you may proceed to upload these to SharePoint.

Step 4: Uploading Files:

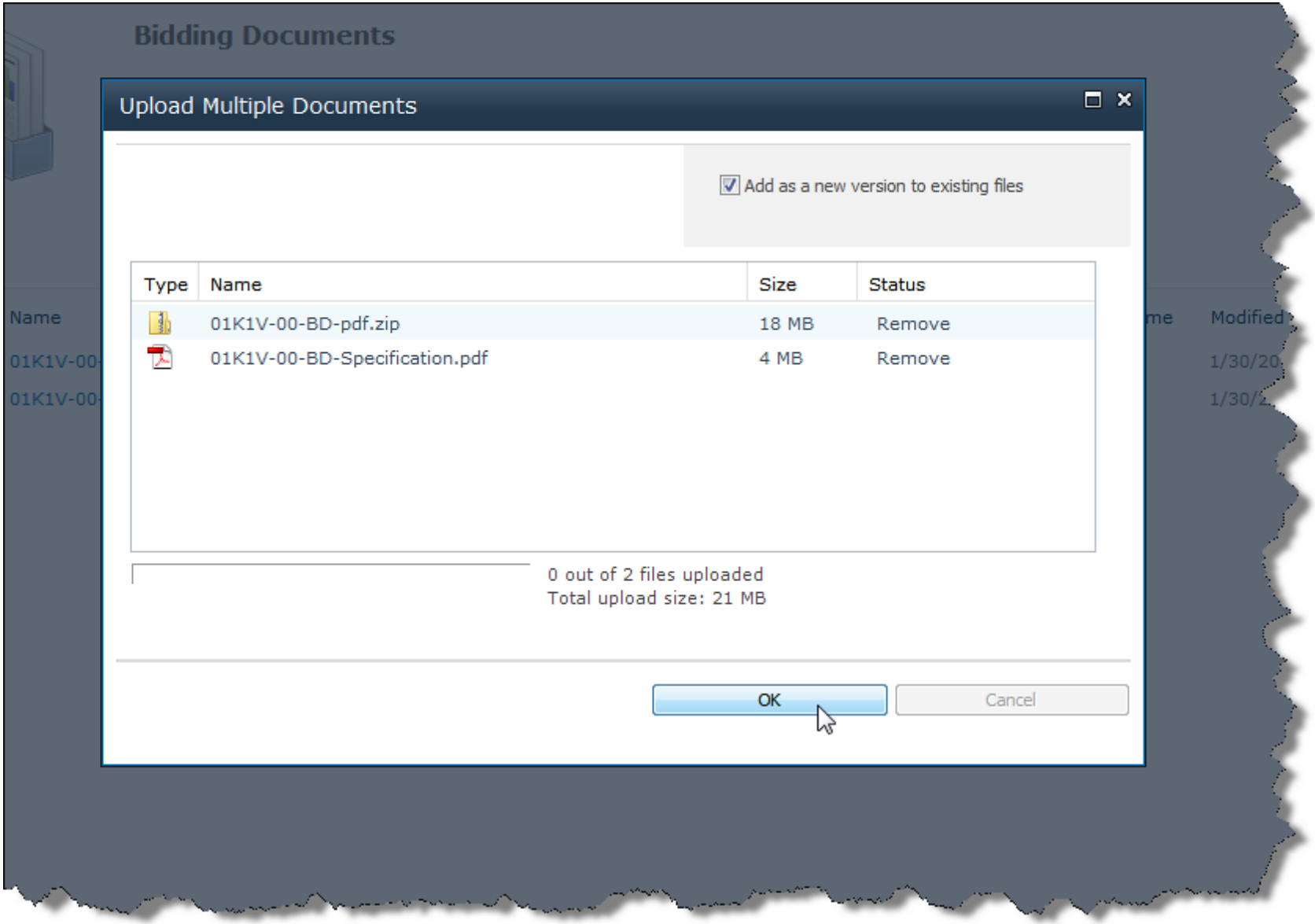
To upload items, such as the Bidding Documents drawings zip folder and Specification document, navigate to the SharePoint destination folder, click the *'Documents'* tab under *'Library Tools'* and use the *'Upload Document'* or *'Upload Multiple Documents'* command.



Can't see 'Upload Multiple Documents'?

If *'Upload Multiple Documents'* does not appear as a menu option, please confirm that you are using Internet Explorer as your Web browser and that you have downloaded any ActiveX controls as prompted via a 'yellow banner' on the DFD SharePoint site.

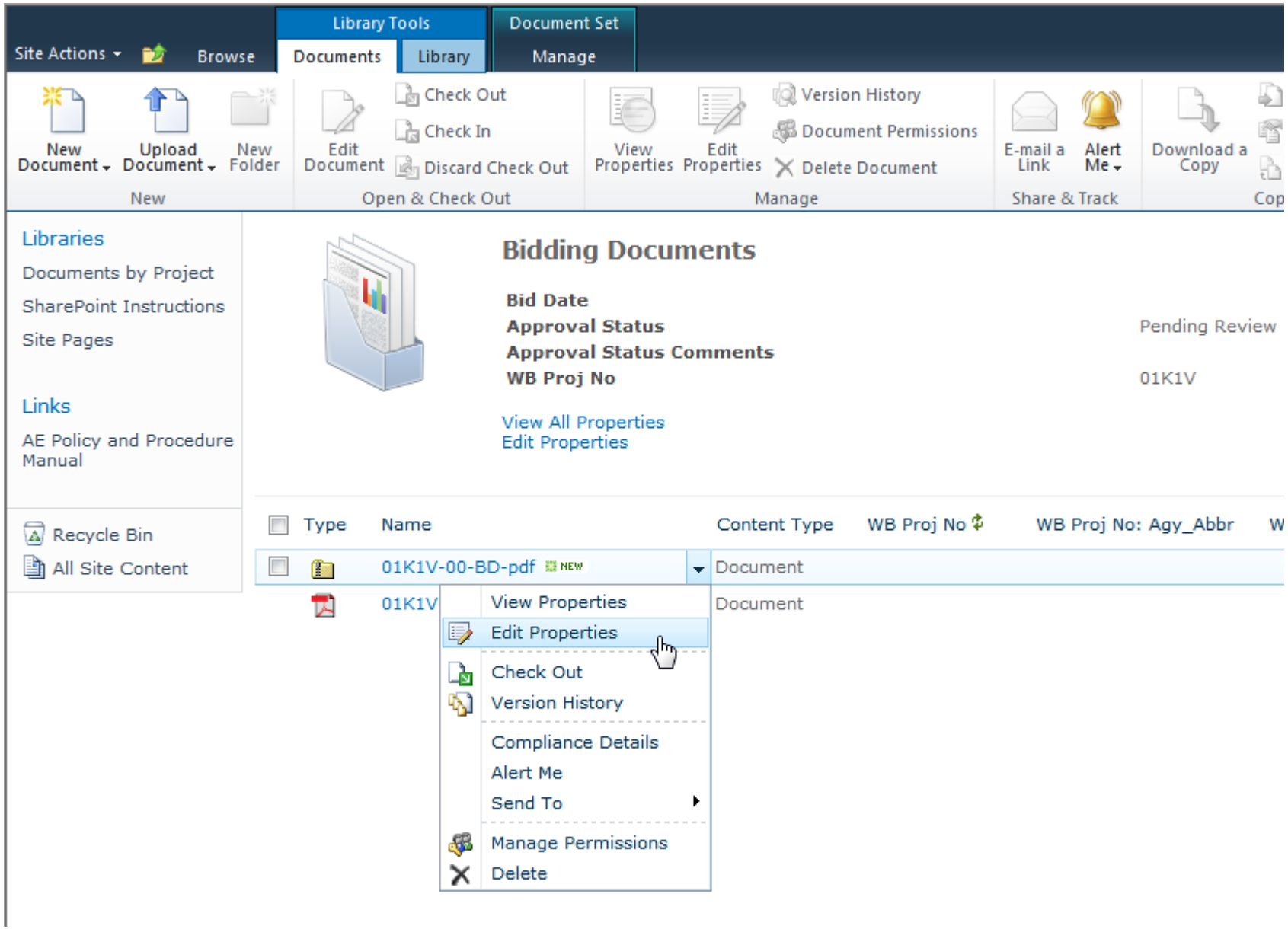
The *'Upload Multiple Documents'* command will enable you to view and locate files on your local PC or network. You may drag & drop files and folders, or click *'Browse for files instead'* to select items to be uploaded within a folder on your local PC/network using the Windows Explorer interface. Click *'OK'* to begin the upload. Click *'Done'* when the upload is complete.



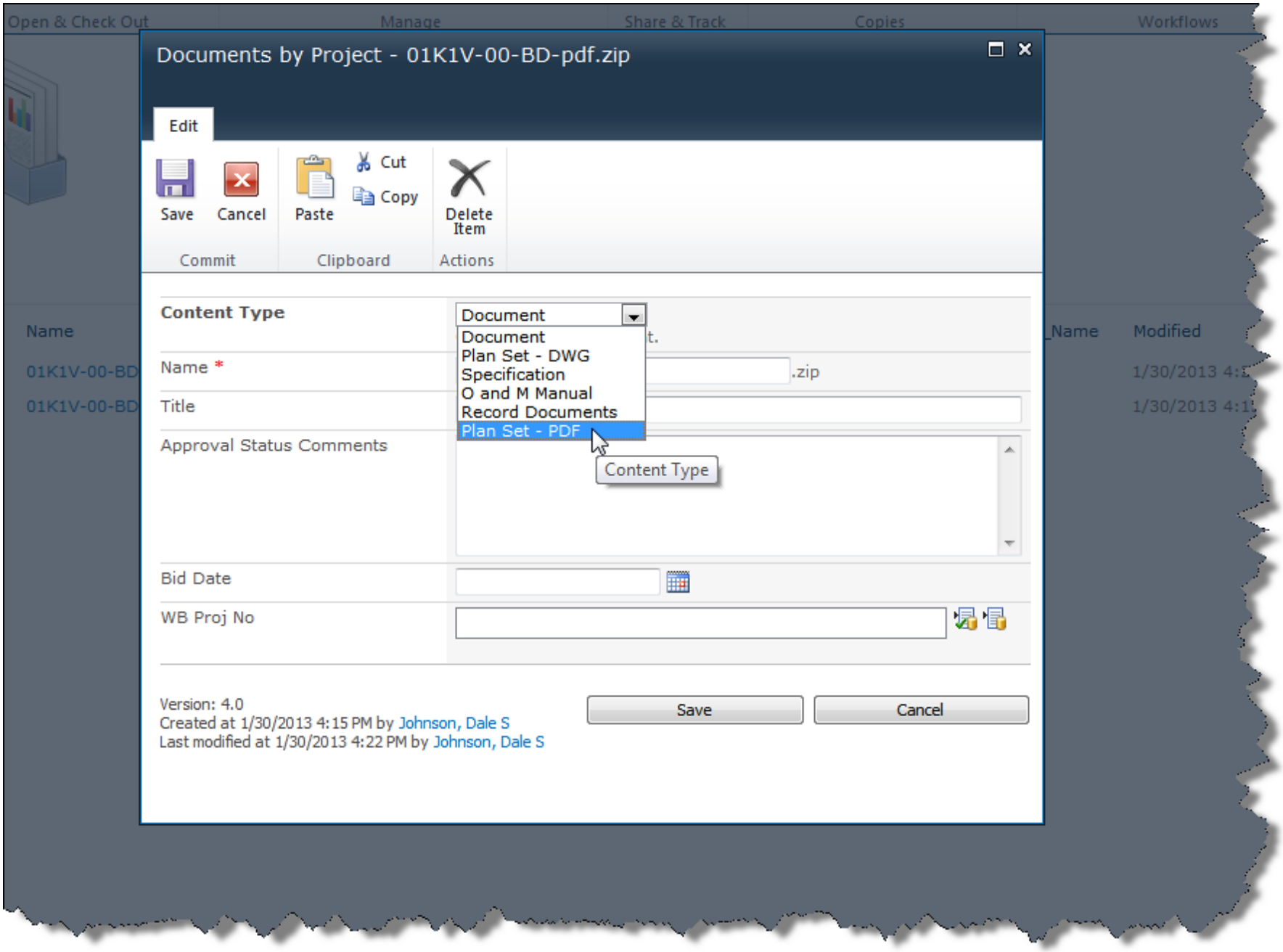
If you are asked to revise any of the previously uploaded documents, simply repeat steps 3 and 4 above. Please note that a revised document should use the **same filename as the original** document to utilize version control within SharePoint.

Step 5: Adding Information to the Uploaded Documents

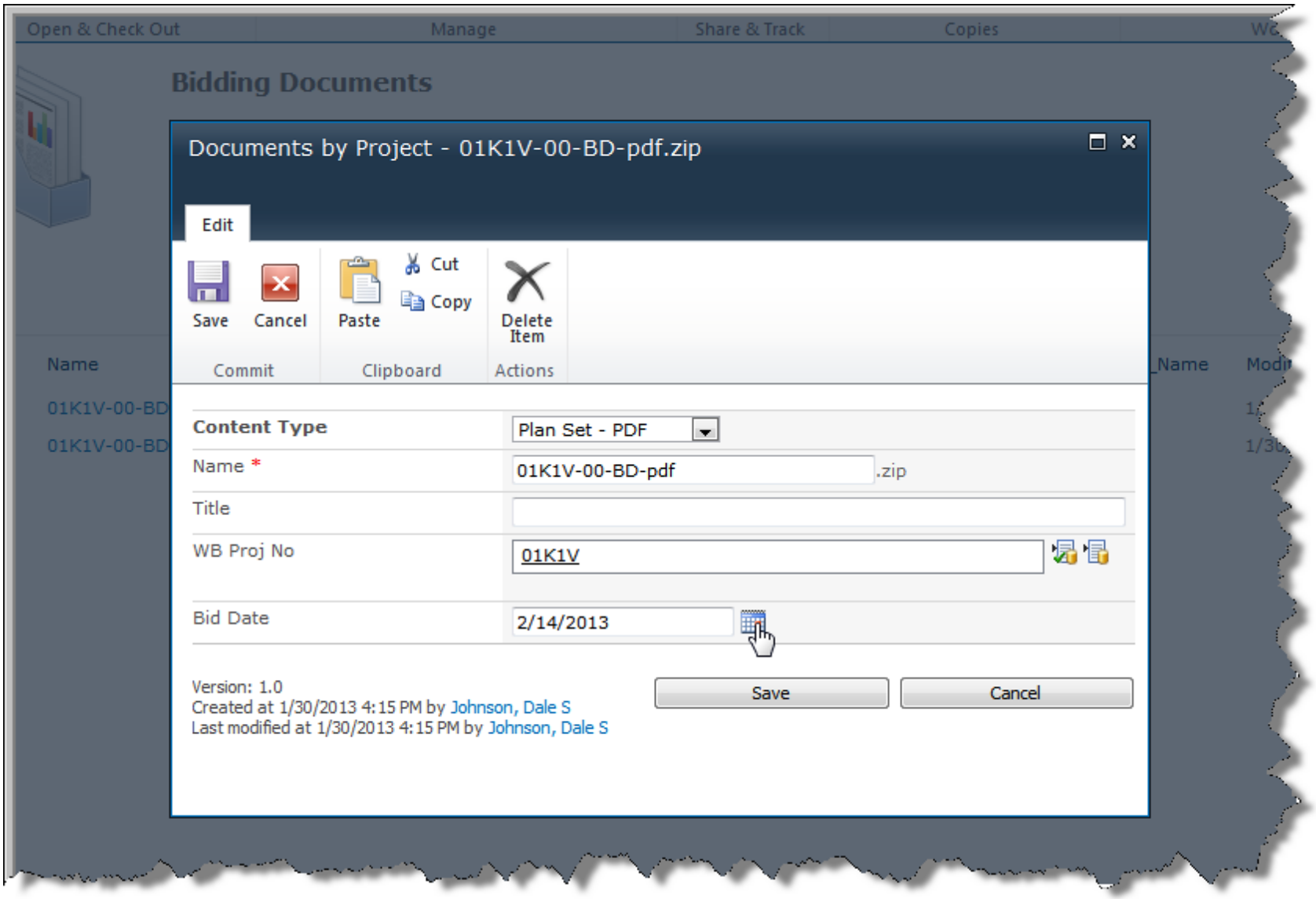
Once the files have been uploaded you must add some information about the individual files. Please add the *'Content Type' and 'WB Proj No'* (project number). Choose *'Edit Properties'* for each uploaded file using the down arrow to the right of the file name.



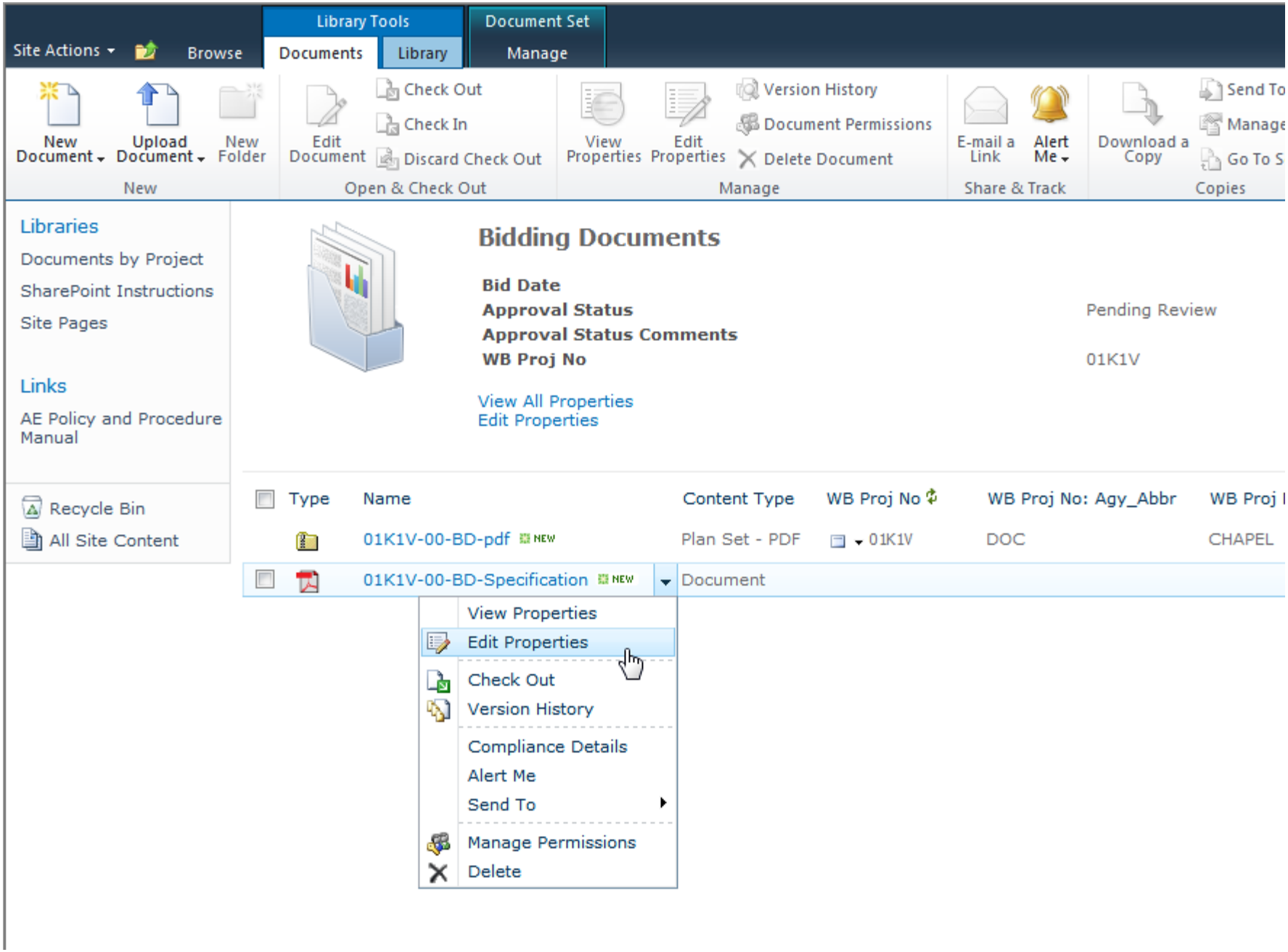
Select the proper *'Content Type'* from the pull-down menu.



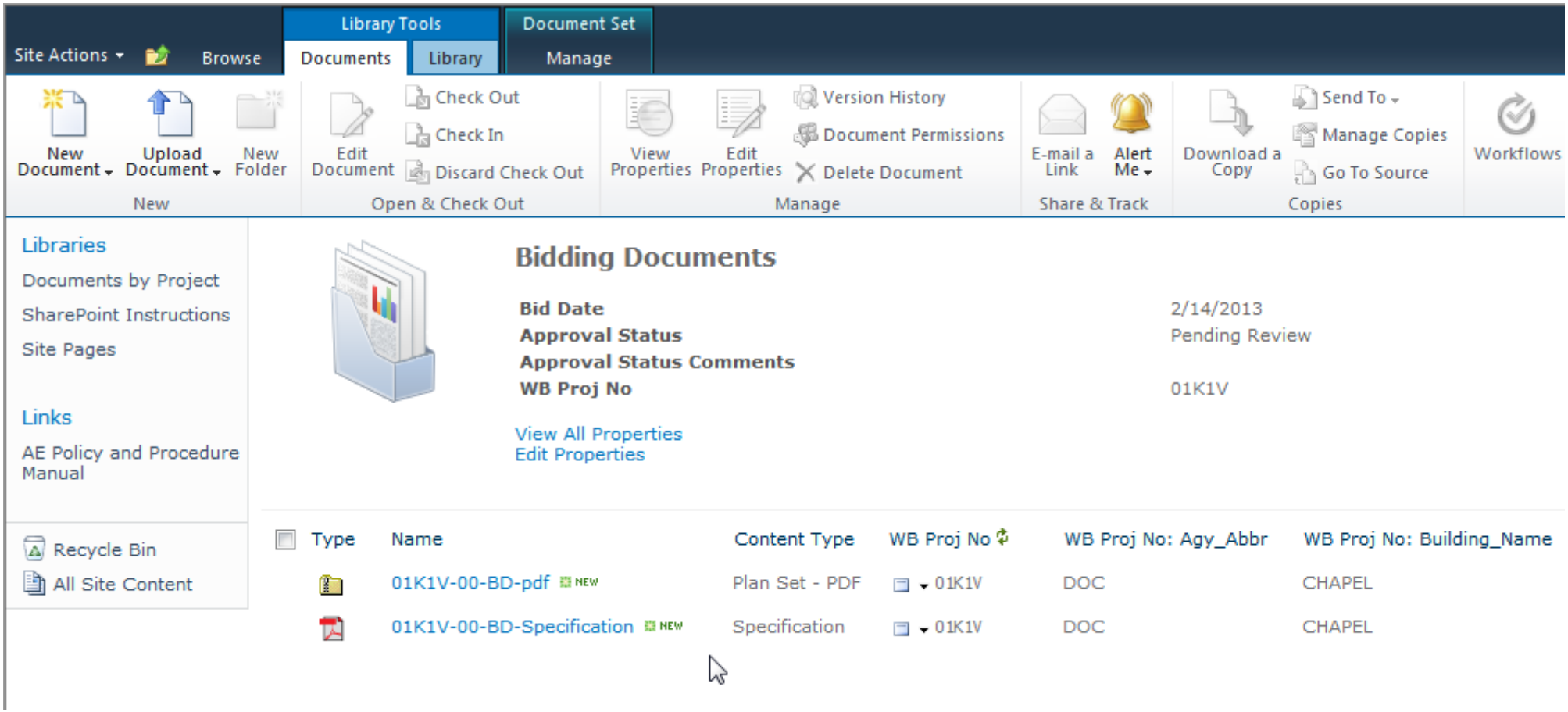
Add the *'WB Proj No'* (project number)



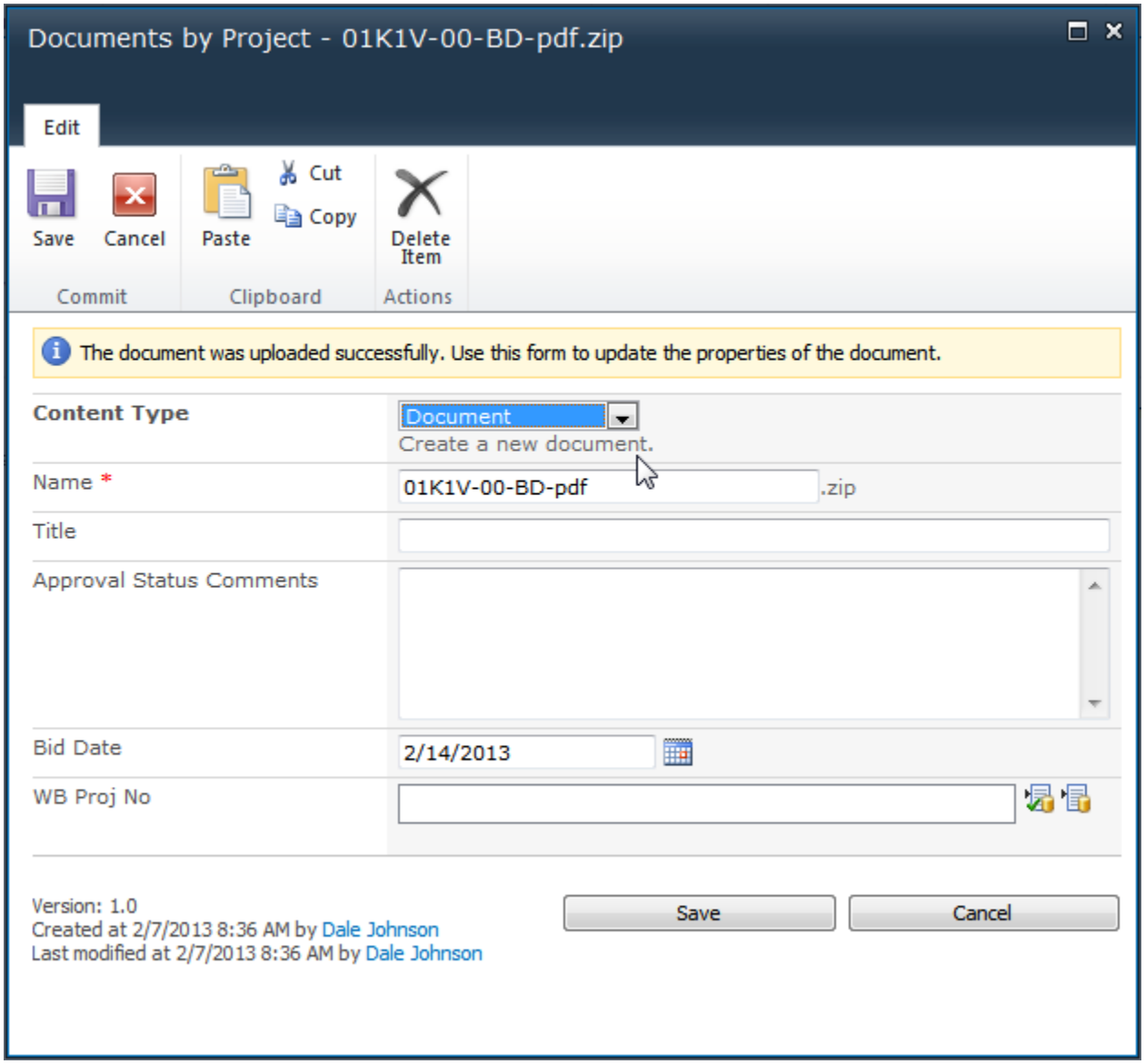
Repeat the process for each uploaded file.



When finished you should see data in each field to the right of the file name.



When uploading one file at a time, you will be prompted for the document properties with each upload by the appearance of the form below.

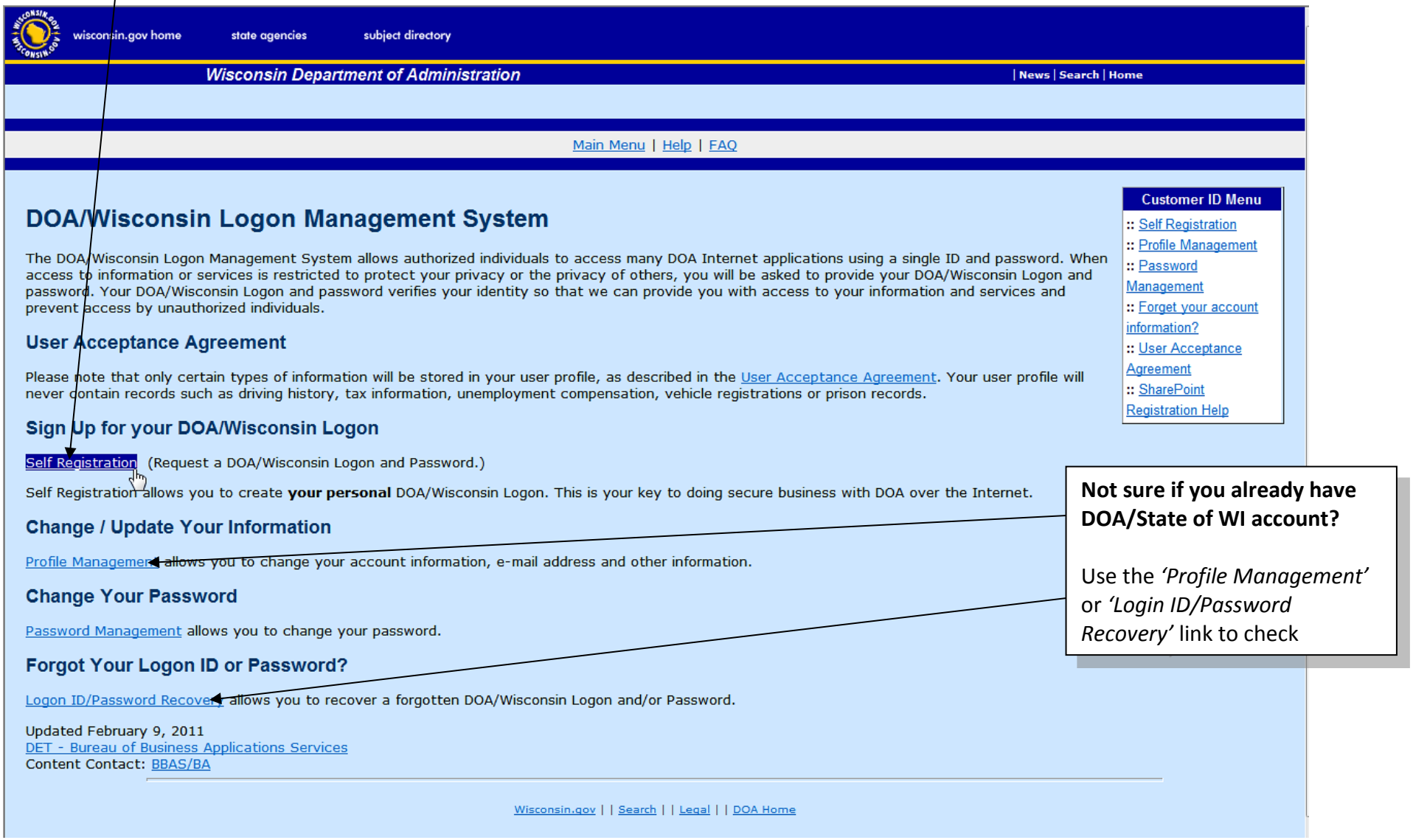


Please add the *'Content Type' and 'WB Proj No'* (project number).
The DFD Project Manager will be notified via a SharePoint alert once the file(s) have been uploaded.
Please email doadfdadminservices@wisconsin.gov with any questions/comments regarding this procedure.

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

In order to access the DFD 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 DFD SharePoint site.

Use the *'Self Registration'* link



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: John *
Middle Initial:
Last Name: Doe *
Suffix:
E-Mail: johndoe@gmail.com *
Phone: Use this format 6085551234 ext.
Mailing Address
Street Address: 101 Main Street
City: Madison
State/Province: Wisconsin
Zip Code: -

Systems You Will Access

Use your mouse to highlight the system that you want to access.

Systems: DHS Vital Records / SharePoint / WEDSS *

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: johndoe *

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: City of birth *
Secret Answer: springfield *

Verification

This step helps prevent automated registrations.
If you cannot see the number below click here.

28433 Please enter the number as it is shown in the box to the left. 28433 *

Once registered, send an email to doadfdadminservices@wisconsin.gov so that you may be given access permission to the appropriate project folder within DFD'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.