

## DFD SharePoint File Transfer Site - Project Manager Instructions

All Final Review, Bidding, Addenda, Construction, and Record Documents are 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 following URL is the link to the new DFD File Transfer Site, please add it to your favorites: <https://webapps.wi.gov/sites/dsf/filetransfer>

PM login to SharePoint is automatic. However, if prompted, PMs may login using either their 'DOA' or 'IAM' username/password. Include the proper 'DOA\' or 'ACCOUNTS\' prefix.

Below are the procedures for DFD Project Managers to use the site for reviewing and approving documents uploaded by the A/E. Please email [doafdadmins@wisconsin.gov](mailto:doafdadmins@wisconsin.gov) with any questions/comments regarding SharePoint procedures.

### 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, record docs and select design contract submittals

### 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

## Creating the project folder and folder permissions

- DFD Administrative Services will create the new project folder set on the SharePoint site. The first design contract uploaded to WisBuild will trigger folder creation. If there is no design contract, the creation of a bid date or direct request from the PM will also serve this function.
- The default project folder structure in SharePoint is shown below:
- The DFD PM and Prime A/E listed in WisBuild will be given access to the project folder. The Prime A/E will receive instructions for accessing the site and uploading documents.

State of Wisconsin - Department of ADMINISTRATION

DFD File Transfer Site

DFD File Transfer Site

Libraries

- Documents by Project
- SharePoint Instructions
- Site Pages

Links

- AE Policy and Procedure Manual

Type	Name	WB Proj No	Content Type	Modified
Folder	1. General		Folder	11/26/2012 12:25 PM
Folder	2. Commissioning		Folder	11/26/2012 12:25 PM
Folder	3. Pre-Design Phase		Folder	11/26/2012 12:25 PM
Folder	4. Prelim Design Phase		Folder	11/26/2012 12:25 PM
Folder	5. Final Design Phase		Folder	11/26/2012 12:25 PM
Folder	6. Bidding Phase		Folder	11/26/2012 12:25 PM
Folder	7. Construction Phase		Folder	11/26/2012 12:25 PM
Folder	8. Post Construction Phase		Folder	11/26/2012 12:25 PM

+ Add document

## Notification of new documents to review

- An alert from the SharePoint site to the PM will be sent via e-mail when the A/E uploads new or revised documents into SharePoint. (see example of email below)

From: Division of State Facilities <SharePointAdmin@wi.gov> Sent: Mon 12/17/2012 3:05 PM  
To: Johnson, Dale S - DOA  
Cc:  
Subject: Documents by Project: 01K1V - 01K1V-00-BD-pdfs.zip

 **DFD File Transfer Site - Documents by Project**  
SharePoint Document Library  
<https://webapps.wi.gov/sites/dsf/filetransfer/Shared%20Documents>

[DFD File Transfer Site](#)  
**01K1V-00-BD-pdfs.zip** has been added

[Modify my alert settings](#) | [View 01K1V-00-BD-pdfs.zip](#) | [View Documents by Project](#) | [Mobile View](#)

<b>Approval Status:</b>	Pending Review
<b>Bid Date:</b>	

Last Modified 12/17/2012 3:01 PM by Johnson, Dale S

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

## Document Review – PM and DFD Front End Reviewer

- The PM should review all documents uploaded to SharePoint. E-mail the A/E directly with any requested revisions. When ready, click *'Edit Properties'* for the **document set** (FR, BD, CD, O&M, RD) or **individual document** (all other document types) and change the *'Approval Status'* of the document set to the appropriate choice.
- If the accepted documents are the final review set, the PM should e-mail the DFD front end reviewer requesting additional review.
- Below are sample screens for adding document properties (metadata) and changing the status of a document set and an individual document.

## Adding Metadata to the Uploaded Documents

Please check the properties of the uploaded files for metadata. The A/Es are instructed to add the *'Content Type'* and *'WB Proj No'* (project number). If they do not, choose *'Edit Properties'* for each uploaded file using the down arrow to the right of the file name and add the metadata.

The screenshot shows the SharePoint interface for a library named "Bidding Documents". On the left, there is a navigation pane with "Libraries" (Documents by Project, SharePoint Instructions, Site Pages) and "Links" (AE Policy and Procedure Manual). Below that are "Recycle Bin" and "All Site Content". The main area displays a document set with the following properties:

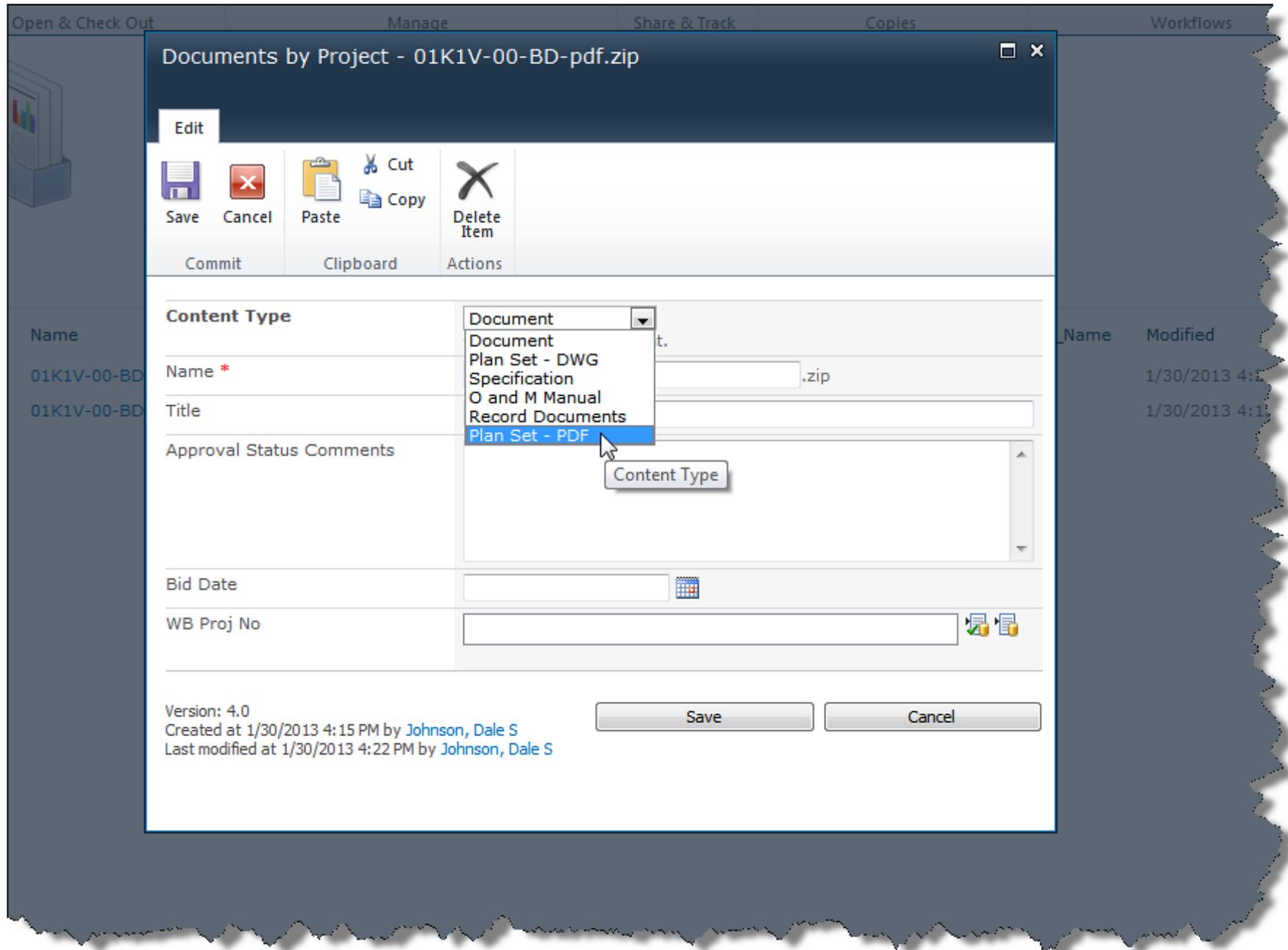
<b>Bid Date</b>	
<b>Approval Status</b>	Pending Review
<b>Approval Status Comments</b>	
<b>WB Proj No</b>	01K1V

Below the properties are links for "View All Properties" and "Edit Properties".

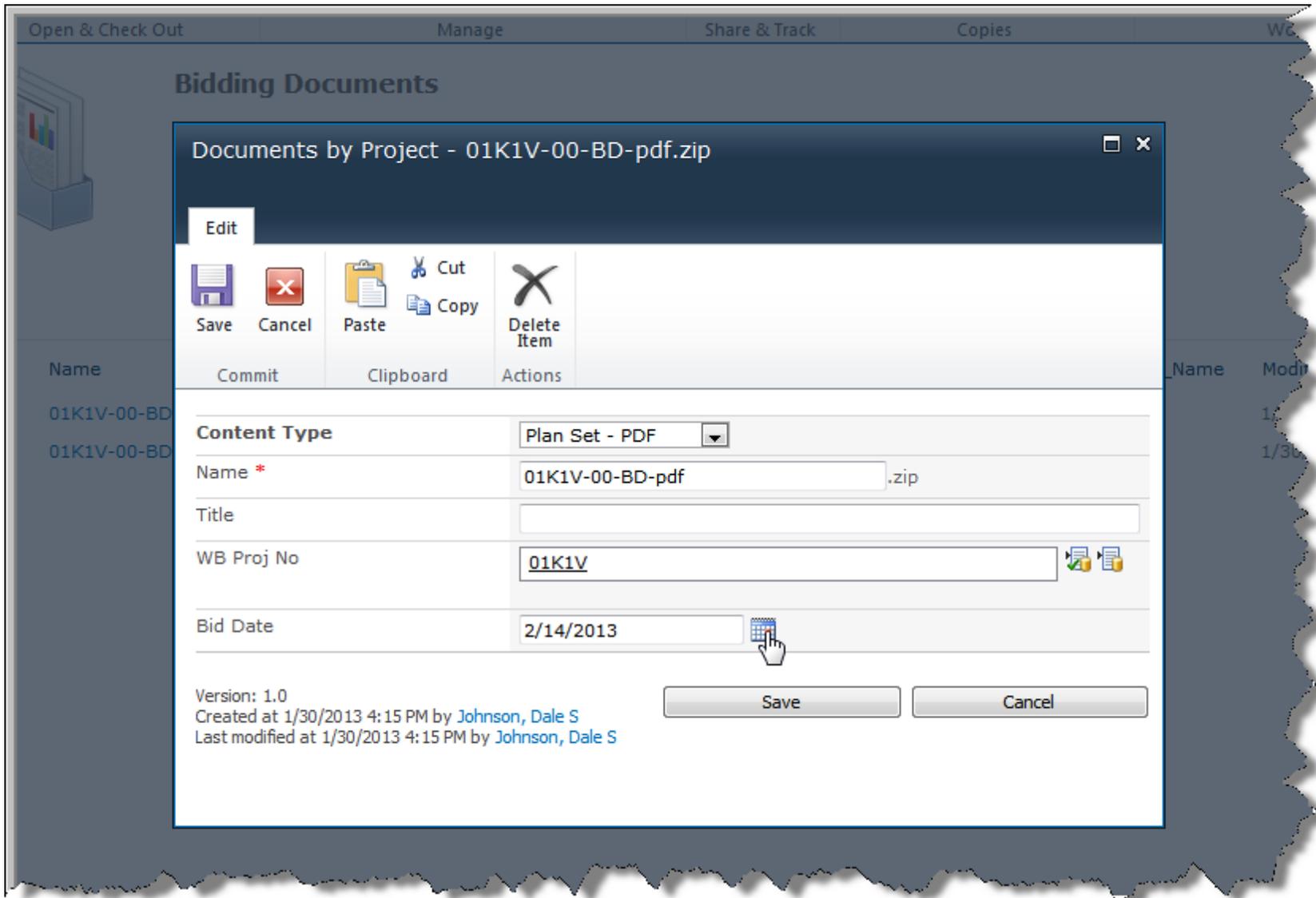
The document set contains a file named "01K1V-00-BD-pdf" with a "NEW" icon. A context menu is open over this file, showing options: "View Properties", "Edit Properties" (highlighted by a mouse cursor), "Check Out", "Version History", "Compliance Details", "Alert Me", "Send To", "Manage Permissions", and "Delete". The table below shows the file's metadata:

Type	Name	Content Type	WB Proj No	WB Proj No: Agy_Abbr	W
	01K1V-00-BD-pdf NEW	Document			
	01K1V	Document			

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



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



Repeat the process for each uploaded file.

The screenshot shows a SharePoint library interface for 'Bidding Documents'. The top ribbon includes 'Library Tools' and 'Document Set' tabs. The 'Library Tools' ribbon has sections for 'New' (New Document, Upload Document, New Folder), 'Open & Check Out' (Edit Document, Check Out, Check In, Discard Check Out), 'Manage' (View Properties, Edit Properties, Version History, Document Permissions, Delete Document), 'Share & Track' (E-mail a Link, Alert Me), and 'Copies' (Download a Copy, Send To, Manage, Go To S).

The main content area displays a document card for '01K1V-00-BD-Specification'. The card shows the following details:

- Bidding Documents**
- Bid Date**
- Approval Status** Pending Review
- Approval Status Comments**
- WB Proj No** 01K1V
- [View All Properties](#)
- [Edit Properties](#)

Below the card is a table of documents:

Type	Name	Content Type	WB Proj No	WB Proj No: Agy_Abbr	WB Proj I
	01K1V-00-BD-pdf <span style="color: green;">NEW</span>	Plan Set - PDF	01K1V	DOC	CHAPEL
	01K1V-00-BD-Specification <span style="color: green;">NEW</span>	Document			

A context menu is open over the '01K1V-00-BD-Specification' document, with the 'Edit Properties' option highlighted by a mouse cursor. The context menu includes: View Properties, Edit Properties, Check Out, Version History, Compliance Details, Alert Me, Send To, Manage Permissions, and Delete.

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

The screenshot shows a SharePoint library interface for 'Bidding Documents'. The ribbon includes 'Library Tools' and 'Document Set' tabs. The 'Library Tools' ribbon has groups for 'New' (New Document, Upload Document, New Folder), 'Open & Check Out' (Edit Document, Check Out, Check In, Discard Check Out), 'Manage' (View Properties, Edit Properties, Version History, Document Permissions, Delete Document), 'Share & Track' (E-mail a Link, Alert Me), and 'Copies' (Download a Copy, Send To, Manage Copies, Go To Source). The 'Document Set' ribbon has a 'Workflows' button.

On the left, there are navigation links for 'Libraries' (Documents by Project, SharePoint Instructions, Site Pages), 'Links' (AE Policy and Procedure Manual), and 'Recycle Bin' (All Site Content).

The main content area displays the following metadata for the selected document:

- Bid Date:** 2/14/2013
- Approval Status:** Pending Review
- Approval Status Comments:**
- WB Proj No:** 01K1V

Below the metadata are links for 'View All Properties' and 'Edit Properties'.

Type	Name	Content Type	WB Proj No	WB Proj No: Agy_Abbr	WB Proj No: Building_Name
	01K1V-00-BD-pdf <span style="color: green;">NEW</span>	Plan Set - PDF	01K1V	DOC	CHAPEL
	01K1V-00-BD-Specification <span style="color: green;">NEW</span>	Specification	01K1V	DOC	CHAPEL

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

# Changing the 'Approval Status' of a Document Set and an Individual Document.

## Document Set

The screenshot shows a SharePoint interface for the 'State of Wisconsin - Department of ADMINISTRATION'. The breadcrumb trail is 'DFD File Transfer Site > Documents by Project ... 6. Bidding Phase >'. The 'Document Set' tab is active, showing a document set named 'Bidding Documents'. The document set properties are: Bid Date: 2/14/2013, Approval Status: Pending Review, Approval Status Comments: (empty), and WB Proj No: 01K1V. Below the properties are two links: 'View All Properties' and 'Edit Properties'. A table below lists the documents in the set:

Type	Name	Content Type	WB Proj No	WB Proj No: Agy_Abbr	WB Proj No: Building_Name
PDF	01K1V-00-BD-pdf	Plan Set - PDF	01K1V	DOC	CHAPEL
PDF	01K1V-00-BD-Specification	Specification	01K1V	DOC	CHAPEL

Add your comments in the 'Approval Status Comments' box.

Wisconsin - Department of ADMINISTRATION

DFD File Transfer Site > Documents by Project ... 6. Bidding Phase > Bidding Documents

Documents by Project - Bidding Documents

**Edit**

Save Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

**Content Type** Document Set  
Create a document set when you want to manage multiple documents as a single work product.

**Name \*** Bidding Documents

**Description**  
A description of the Document Set

**Bid Date** 2/14/2013

**Approval Status** Pending Review

**Approval Status Comments**  
Approval Status

WB Proj No 01K1V

Modified 2/7/2013 8:54 AM

2/7/2013 8:54 AM

# Individual Document

Site Actions ▾ Browse Library Tools Documents Library Document Set Manage

State of Wisconsin - Department of **ADMINISTRATION** DFD File Transfer Site ▸ Documents by Project ... 6. Bidding Phase ▸ Ad

DFD File Transfer Site Se

**Libraries**  
Documents by Project  
SharePoint Instructions  
Site Pages

**Links**  
AE Policy and Procedure Manual

Recycle Bin  
 All Site Content

**Addenda**  
**WB Proj No** 01K1V  
**Bid Date** 2/14/2013  
[View All Properties](#)  
[Edit Properties](#)

<input type="checkbox"/> Type	Name	Approval Status	WB Proj No	Content Type	Modified
<input type="checkbox"/>	01K1V-00-SD-Addendum ▾	Pending Review	▾ 01K1V	Addendum	2/13/2013

- View Properties
- Edit Properties**
- Check Out
- Version History
- Compliance Details
- Alert Me
- Send To ▸
- Manage Permissions
- Delete

Add your comments in the 'Approval Status Comments' box.

onsin - Department of  
**MINISTRATION** DFD File Transfer Site > Documents by Project ... 6. Bidding Phase > Addenda

Search this site...

Documents by Project - 01K1V-00-SD-Addendum.pdf

**Edit**

Save Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

**Content Type** Addendum

**Name \*** 01K1V-00-SD-Addendum.pdf

**Title**

**WB Proj No** 01K1V

**Bid Date** 2/14/2013

**Approval Status** Pending Review

**Approval Status Comments**

Approval Status

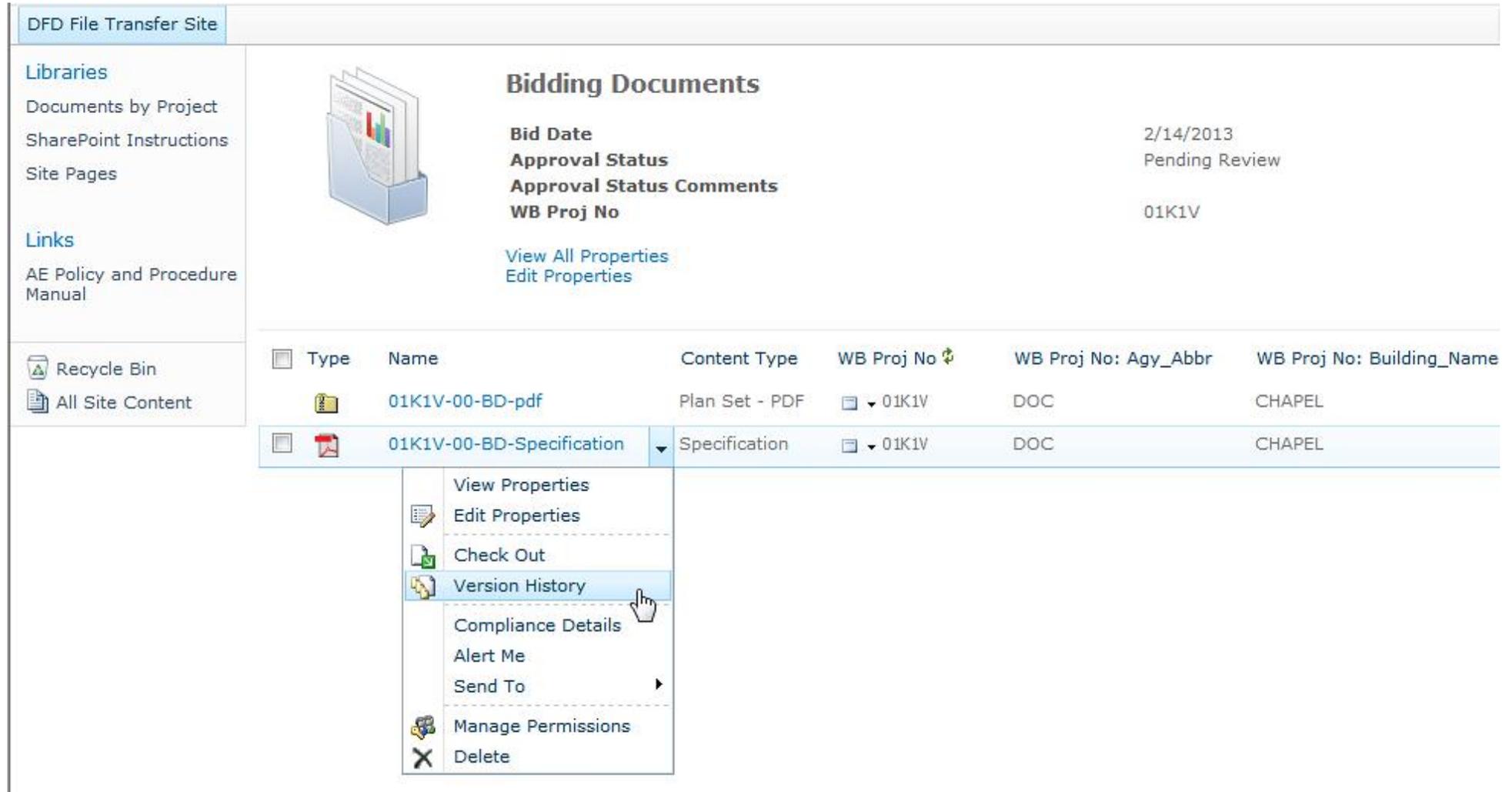
Version: 7.0  
Created at 11/30/2012 1:38 PM by Johnson, Dale S  
Last modified at 2/13/2013 3:13 PM by Johnson, Dale S

Save Cancel

ified  
3/2013 3:13 PM

## Document Revisions by A/E

- The A/E should upload revised documents in SharePoint **using the same filename as the previous version**. SharePoint will automatically create a new version of the document while retaining the old version. Select '*Version History*' as seen below to view the multiple versions of a document.



The screenshot shows a SharePoint interface for a site named "DFD File Transfer Site". On the left, there is a navigation pane with sections for "Libraries" (Documents by Project, SharePoint Instructions, Site Pages), "Links" (AE Policy and Procedure Manual), "Recycle Bin", and "All Site Content". The main content area displays the "Bidding Documents" library. A document card is shown with the following properties:

- Bid Date:** 2/14/2013
- Approval Status:** Pending Review
- Approval Status Comments:**
- WB Proj No:** 01K1V

Below the card are links for "View All Properties" and "Edit Properties". A table lists the documents in the library:

Type	Name	Content Type	WB Proj No	WB Proj No: Agy_Abbr	WB Proj No: Building_Name
Plan Set - PDF	01K1V-00-BD-pdf	Plan Set - PDF	01K1V	DOC	CHAPEL
Specification	01K1V-00-BD-Specification	Specification	01K1V	DOC	CHAPEL

A context menu is open over the "01K1V-00-BD-Specification" document, with the "Version History" option highlighted by a mouse cursor. The menu items are: View Properties, Edit Properties, Check Out, Version History, Compliance Details, Alert Me, Send To, Manage Permissions, and Delete.

The PM will NOT receive a SharePoint alert e-mail notification when a revised document has been uploaded by the A/E. Please confirm that revised documents have been transferred via direct e-mail communications with the A/E.

## Summary of Document Types on DFD Transfer Site

Document	Transfer Method	Approval Party	Permanent Storage Location	Who Uploads to Permanent Location	Retention Policy
<b>Final Review Documents</b>	SharePoint 2010	NA	None	Admin Services	Until Record Docs Received
<b>Bidding Documents</b>	SharePoint 2010	Front End Reviewer PM	WisBuild	Admin Services	10 Years after Project Close
<b>Supplemental Docs_Addenda</b>	SharePoint 2010	PM	WisBuild	Admin Services	10 Years after Project Close
<b>Construction Documents</b>	SharePoint 2010	PM	WisBuild	Admin Services	10 Years after Project Close
<b>Record Documents</b>	SharePoint 2010	PM Admin	G Drive	Admin Services	Forever
<b>Design Contract Submittals</b> <b>Prof Liability Insurance*</b> <b>Final CxP Report</b> <b>Design Report</b> <b>Final T&amp;B Report</b> <b>O&amp;M Manual</b> <b>Building Cost Data Report</b>  <b>*from AE Data Record</b>	SharePoint 2010	PM	WisBuild	Admin Services	10 Years after Project Close