**Project Folder Set-up –** Facility Records creates project folders as assigned in TMA. PM may delete all sub folders if they meet all documentation requirements in 18 files or less (*and disregard item 3 in folder finalization*). **Project Folder Finalization –**

1. Delete all empty folders, unused template files, duplicate files
2. Rotate/save all documents to correct viewing orientation
3. Make sure all documents are in appropriate folder (no loose files in main project folder or 4 subfolders)
4. Zip any permitted folders with files not named to convention and name folder per convention
5. Use file search tool to make sure all unzipped documents meet naming convention

**Project Folder Structure –** 66 folders – symbolized by 🗁, 🗀, or ◼, abbreviated folder names **bold**

* **Project # - name** ***(unzipped)***
  + - * + **1. SSB** – Scope, Schedule, Budget – all phase

**\_BIM** –BIM Requirements

**\_Cx** –Commissioning

**COMM** –Communications

**LOGS** –Issue Logs – Note: final Issue Log go in >4. T&C >LISTS

**PLAN** –Cx Plan

**TSTG** – Functional Testing – Note: final testing to go in >4. T&C >INSP

**\_LEED** - LEED requirements

**\_PSAs** - Professional Service Agreements and Contracts

**\_RFQP** - Requests for qualifications and proposals and responses

**BDGT** – Budget

**BIDS**

**Changes -** Change Orders, change directives, etc.

**Payment**

**INVC** - Invoice

**PAYAP** - Pay Applications

**POs** - Purchase Orders

**PRO** – Procard

**SCHD** - Schedule

**SCOPE** - Project Scope

* + - * + **2. DSGN** – Design (P1-P5)***(unzipped)***

**COMM** – Communications through design up to bidding

**MEET** – Meeting agendas and minutes through design up to bidding

**Photos** – Existing condition and/or design idea images

**PLANS** – Preliminary plans and specifications up to bid documents

**\_PRGM** – Programming

*Owner Project Requirements, Basis of Design, Studies*

**\_SD** – Schematic Design

**DD** – Design Development - ◼ **50**%, ◼ **90**%, ◼ **100**%

**prelim CDs** – Preliminary CDs ◼ **50**% and ◼ **90**%

*Note: 100% CDs to be filed in >3. CNST>\_CDs*

**REF** – Reference Files (any documentation pulled from the V drive)

*Do not rename reference files -Delete any files that are not necessary to be maintained in the project folder - Zipping REF folder is mandatory to maintain any reference files*

* + - * + **3. CNST** – Construction (P6-P8)***(unzipped)***

**\_BIDpk** – Bid Package -drawings and specs issued for BID if different from construction issue

**\_CDs** – Construction Documents - Drawings and specs issued for Construction

**ADD** – All Construction Addenda - change to BID docs before contract award

**BULL** – All Construction Bulletins - change to CDs after contract award

**COMM** – Communications from bidding through construction

**MEET** – Meeting agendas and minutes from bidding through construction

**Photos** – Photos during construction

**PRMT** – Permits (Construction)

**RFI** – Requests for information

**RPTS** – Construction reports

*Note: any final reports to be filed in >4. T&C>RPTS*

**SUBM** – Received submittals

*Note: approved submittals to be filed in >4. T&C>SUBM*

* + - * + **4. T&C** –Turnover & Closeout (P7-P8) ***(unzipped)***

**\_FMs** – Required Turnover & Closeout Forms and Instructions ***(unzipped)***

**\_RCD** - Record Drawings & Specs ***(unzipped)***

*CD package revised by A/E firm to reflect t As-built Drawings & Specs - PDF and CAD required - each sheet of drawing set as separate file in two formats named identically - BIM as applicable*

**BIM *(unzipped)***

**CAD *(unzipped)***

**PDF *(unzipped)***

**SPEC *(unzipped)***

**ASB** – As-built Drawings & Specs ***(unzipped)***

*Red lines marked up by contractors/installers - 1st page of mark-ups to clearly note: As-built, name of person and organization marking up the drawings and date marked up -PDF format in sets*

**COMM** – Communications through turnover and closeout

**INSP** – Inspections, TAB report, permits ***(unzipped)***

**LISTS** – Punchlist, Attic Stock, etc. ***(unzipped)***

**OM** - Operation Manuals ***(unzipped)***

**OPs** – Operational Documents ***(unzipped)***

*Simple Floor Plans, Space Input Sheet for TMA, Emergency Egress Plans, BAS, Etc.*

*Note: For larger projects, discipline sub-folders should be used*

**Photos** -Photos of Completed Work - option to zip

**RPTS** –Reports – all final reports ***(unzipped)***

**SCOPE** –Revised final scope summary ***(unzipped)***

**SUBM** – Approved Submittals including Shop Drawings ***(unzipped)***

*Must have all required signatures included in document and file name - field 4 =approved*

**TRNG** –Training materials, logs, etc. ***(unzipped)***

**WNTY** –Warranties ***(unzipped)***

*Individual and summary with warranter contact and expiration date*