Project File Index & Folder Structure

Construction Division – December 2023

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Standard Folder Structure

Construction Division Standard Folder Structure

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- 2 CONTRACT ADMINISTRATION
- 3 ENVIRONMENTAL
- 4 ESTIMATES
- 5 CHANGE ORDERS
- 6 PROJECT DOCUMENTATION
- 7 FINAL PROJECT DOCUMENTATION

Standard Folder Structure

1
- 1 INDEX and CONTRACT DOCUMENTS
  - 1.01 Contract Etc
    - Default or Termination
    - Pre-Bid Q and A
  - 1.02 Prime Contractor
  - 1.03 Subcontractors
    - SUB 001 NAME
    - SUB 002 NAME
  - 1.04 Certifications
  - 1.05 Equipment
  - 1.06 ROW and Utilities

2
- 2 CONTRACT ADMINISTRATION
  - 2.01 Project Time
  - 2.02 Labor Compliance
    - Additional Wage Rate Request
    - Labor Interviews
  - 2.03 DBE SBE OJT
  - 2.04 Prompt Pay
  - 2.05 Bulletin Board Checklist
  - 2.06 Lane Closures
  - 2.07 General Correspondence
  - 2.08 Audits and Reviews

3
- 3 ENVIRONMENTAL
  - 3.01 Env +1 Acre
    - Stage Gate
    - SWP3 Binder and Attachments
  - 3.01 Env -1 Acre

4
- 4 ESTIMATES

5
- 5 CHANGE ORDERS
  - CO 01
  - CO 02

6
- 6 PROJECT DOCUMENTATION
  - 6.01 Pay Item Support
  - 6.02 Materials
  - 6.03 Schedules
  - 6.04 RFIs
  - 6.05 Meetings
  - 6.06 Shop Drawings

7
- 7 FINAL PROJECT DOCUMENTATION

CST Project File Index

Project File Index

- Excel File

- Part of the Folder System (1 INDEX and CONTRACT DOCUMENTS)

- Naming Convention

- Brief Description

- Two Search Features

Tab 1 - MAIN INDEX OVERVIEW - Overall brief view of Project Folder Setup.
Tab 2 - INDEX - Detailed folder descriptions, naming convention and a search option.
Tab 3 - SEARCH - Single key word search option.

1 INDEX and CONTRACT DOCUMENTS
    1.01   Contract Etc.
    1.02   Prime Contractor
    1.03   Subcontractors
    1.04   Certifications
    1.05   Equipment
    1.06   ROW and Utilities

2 CONTRACT ADMINISTRATION
    2.01   Project Time
    2.02   Labor Compliance
    2.03   DBE SBE OJT
    2.04   Prompt Pay
    2.05   Bulletin Board Checklist
    2.06   Lane Closures
    2.07   General Correspondence
    2.08   Audits and Reviews

3 ENVIRONMENTAL

4 ESTIMATES

5 CHANGE ORDERS

6 PROJECT DOCUMENTATION
    6.01   Pay Item Support
    6.02   Materials
    6.03   Schedules
    6.04   RFI
    6.05   Meetings
    6.06   Shop Drawings

7 FINAL PROJECT DOCUMENTATION

MAIN INDEX OVERVIEW | INDEX Details-Naming Convention | SEARCH

Project File Index – INDEX (Tab 2)

- BOLD Underline – FOLDER NAME or Suggested Naming Convention

- Italics (and parenthesis) – brief description, guidance and information

- ICONS
  - folder

  - document

PROJECT FILE INDEX

CSJ: _____

PROJECT: _____

CONTRACTOR: _____

KEY WORD SEARCH: _____

type in key word and press ENTER, scroll through document to find highlighted folder

BOLD Underline - FOLDER NAME or Suggested Naming Convention - *Italics (and parenthesis) - brief description, guidance and information*

1.03 **Subcontractors** - *create sub folders as needed; use SM 3 digit subcontractor number which will match the SM Subcontractor Summary Report*

SUB 001 "NAME" - *identify if DBE after subcontractor name, i.e. SUB 001 JD Construction-DBE; include any other documentation as needed i.e. district checklist*

xxxCSJxxx Sub 001 "Name-" Form2802 - *Form 2802 Subcontractor Request for Approval- required for all subcontractors working on the project; including CSJ in file name assist when sharing documents within area office, district and division*

xxxCSJxxx Sub 001 "Name" Contract - *Fully executed contract with required special provisions between Prime and Subcontractor - required for all DBE subcontractors and one NON-DBE per project; see CCAM Chapter 10, Section 3*

SUB 002 "NAME" - *identify if DBE after subcontractor name, i.e. SUB 001 JD Construction-DBE; include any other documentation as needed i.e. district checklist*

xxxCSJxxx Sub 002 "Name-" Form2802 - *Form 2802 Subcontractor Request for Approval- required for all subcontractors working on the project; including CSJ in file name assist when sharing documents within area office, district and division*

Project File Index – INDEX (Tab 2)

- Type in keyword and press ENTER

- Scroll down, search results will be highlighted

- Delete keyword to start search over

Example Search: Change Order

Example Search: subcontractor

PROJECT FILE INDEX

CSJ: _____

PROJECT: _____

CONTRACTOR: _____

KEY WORD SEARCH: subcontractor

type in key word and press ENTER, scroll through document to find highlighted folder

BOLD Underline - FOLDER NAME or Suggested Naming Convention - *Italics (and parenthesis) - brief description, guidance and information*

1.02 Prime Contractor

xxxCSJxxx YYYYMMDD Form2795 - *Form 2795 Contractor Staff Designation-use date of contractor signature for file name;* **this file is originally submitted at pre-con and is also part of the pre-con packet;** *any updates to the contractor staff designee's can be done with an email - save any updates using the date of new submittal*

1.03 Subcontractors - *create sub folders as needed; use SM 3 digit subcontractor number which will match the SM Subcontractor Summary Report*

SUB 001 "NAME" - *identify if DBE after subcontractor name, i.e. SUB 001 JD Construction-DBE; include any other documentation as needed i.e. district checklist*

xxxCSJxxx Sub 001 "Name-" Form2802 - *Form 2802 Subcontractor Request for Approval- required for all subcontractors working on the project; including CSJ in file name assist when sharing documents within area office, district and division*

xxxCSJxxx Sub 001 "Name" Contract - *Fully executed contract with required special provisions between Prime and Subcontractor - required for all DBE subcontractors and one NON-DBE per project; see CCAM Chapter 10, Section 3*

SUB 002 "NAME" - *identify if DBE after subcontractor name, i.e. SUB 001 JD Construction-DBE; include any other documentation as needed i.e. district checklist*

xxxCSJxxx Sub 002 "Name-" Form2802 - *Form 2802 Subcontractor Request for Approval- required for all subcontractors working on the project; including CSJ in file name assist when sharing documents within area office, district and division*

xxxCSJxxx Sub 002 "Name" Contract - *Fully executed contract with required special provisions between Prime and Subcontractor - all DBE subcontracts are required to be on file and one NON-DBE per project; see CCAM Chapter 10, Section 3*

1.04 Certifications – *identify by prime or subcontractor using sub folders if applicable; i.e. Electricians, Welders, ACI Shotcrete Nozzleman, Mobile Retroreflectivity Operartor; JD Construction-Electrician*

1.05 Equipment - *identify by prime or subcontractor using sub folders if needed; may require multiple; review contract specifications for requirements*

Contractor - Haul Truck Measurements

Contractor - Water Truck Measurements

Project File Index – SEARCH (Tab 3)

- Type in keyword and press ENTER

- Search results will come up automatically

- Delete keyword to start search over

Enter search word above to filter folders. Delete entry to start new search.

FOLDER	DESCRIPTION
1	CONTRACT DOCUMENTS
1.01	Contract Etc.
1.01	Plans
1.01	Proposal & Addendums
1.01	Bid Tabs
1.01	Award
1.01	Authorization to Begin Work, ABW & Contract
1.01	AFA's Advance Funding Agreement
1.01	Pre-Bid Q&A
1.02	Default and/or Termination
1.03	Prime Contractor 2795-Contractor Staff Designee Submission
1.04	Subcontractors 2802 - Request for Subcontractor Approval
1.05	Certifications

Example Search: change

change	

Enter search word above to filter folders. Delete entry to start new search.

FOLDER	DESCRIPTION
3.05	Change Orders (2146, 1295)
4.01	Change Order Summary Report

Example Search: time

time	

Enter search word above to filter folders. Delete entry to start new search.

FOLDER	DESCRIPTION
2.01	Project Time
2.01	Time Credit Day(s) Request Letter, Time Suspension
2.01	Time Credit Day(s) Approval Letter, Time Suspension
2.01	Time Charges Resume Letter
7.01	Final Time Summary Report

Where Can I find the Index?

Project File Index Excel file will be posted to Crossroads

-Construction Division
   -Training & Development
   -Record Keeper Development Program

Recordkeeper Development Program

Beginning with January 2024 letting, all Construction Projects will be stored in ProjectWise.

Visit the ProjectWise Support page for instructions on how to build the folder structure into your NEW projects. Video and written directions available.

Include the folder build in PW as part of the Activation process.

ProjectWise Work Area Creation tool from Excel Template
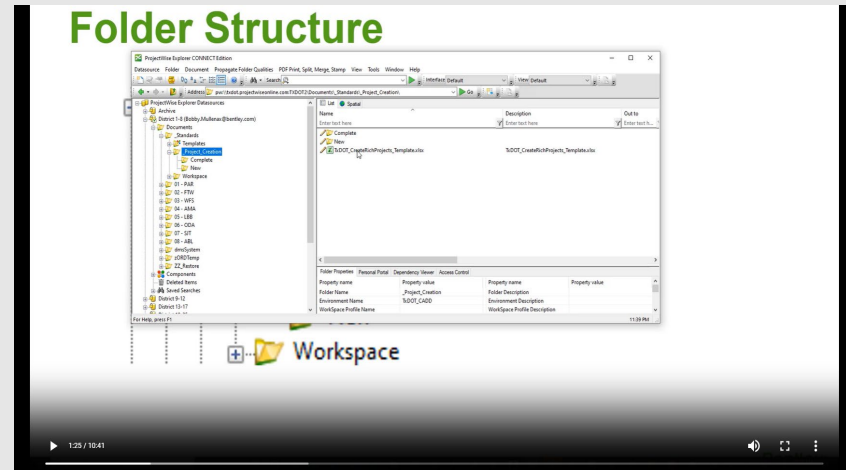
Please note: the folder structure will be an AUTO build by the ProjectWise Support; Not available until January 6, 2024.

Standard Folder Structure – ProjectWise View
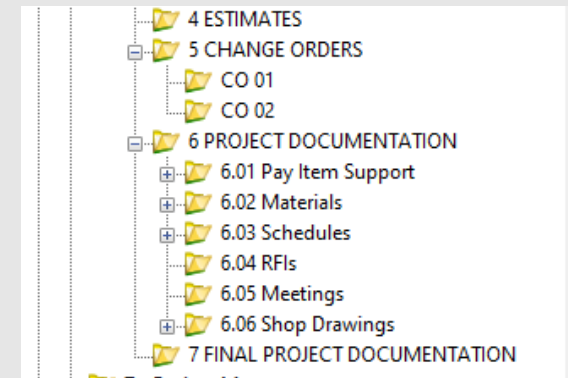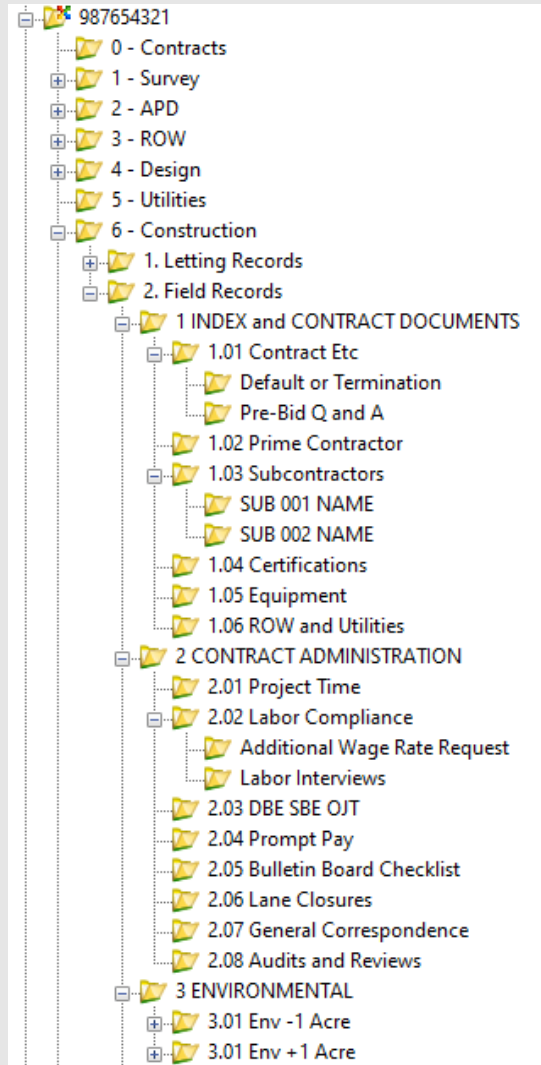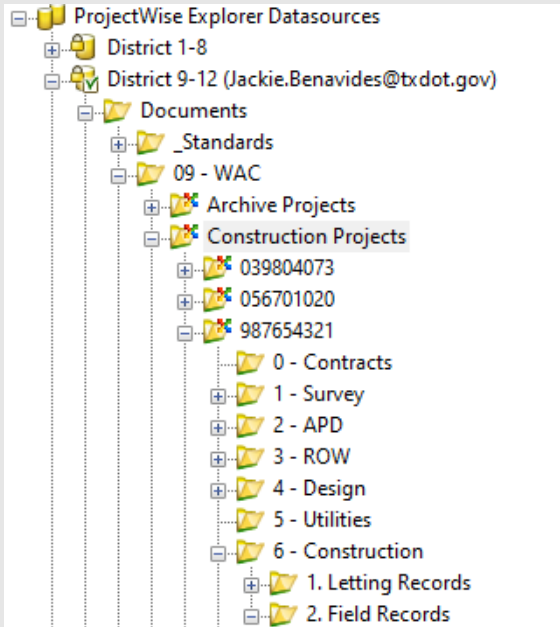
Please email: cst-constructionsupport@txdot.gov