



# Project File Index & Folder Structure

Construction Division – December 2023



**1** Standard Folder Structure

**2** Project File Index








**3** ProjectWise Basics

**4** Live Examples

**5** Questions



## Construction Division Standard Folder Structure

-  1 INDEX and CONTRACT DOCUMENTS
-  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



- Excel File
- Part of the Folder System (1 INDEX and CONTRACT DOCUMENTS)
- Naming Convention
- Brief Description
- Two Search Features

	A	B	C	D	E
1					
2			Tab 1 - MAIN INDEX OVERVIEW - Overall brief view of Project Folder Setup.		
3			Tab 2 - INDEX - Detailed folder descriptions, naming convention and a search option.		
4			Tab 3 - SEARCH - Single key word search option.		
5					
6					
7			<b>1 INDEX and CONTRACT DOCUMENTS</b>		
8		1.01	Contract Etc.		
9		1.02	Prime Contractor		
10		1.03	Subcontractors		
11		1.04	Certifications		
12		1.05	Equipment		
13		1.06	ROW and Utilities		
14					
15			<b>2 CONTRACT ADMINISTRATION</b>		
16		2.01	Project Time		
17		2.02	Labor Compliance		
18		2.03	DBE SBE OJT		
19		2.04	Prompt Pay		
20		2.05	Bulletin Board Checklist		
21		2.06	Lane Closures		
22		2.07	General Correspondence		
23		2.08	Audits and Reviews		
24					
25			<b>3 ENVIRONMENTAL</b>		
26					
27			<b>4 ESTIMATES</b>		
28					
29			<b>5 CHANGE ORDERS</b>		
30					
31			<b>6 PROJECT DOCUMENTATION</b>		
32		6.01	Pay Item Support		
33		6.02	Materials		
34		6.03	Schedules		
35		6.04	RFI		
36		6.05	Meetings		
37		6.06	Shop Drawings		
38					
39			<b>7 FINAL PROJECT DOCUMENTATION</b>		
40					
41					
42					
43					
44					
45					
46					



- **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



- Type in keyword and press ENTER
- Scroll down, search results will be highlighted
- Delete keyword to start search over

**Example Search:  
Change Order**

**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**

**5 CHANGE ORDERS**

**5.01 Change Orders** - create sub folders for each change order; use two digit change order number for naming convention

**CO 01**

**DIS xxxCSJxxx CO#01** - Complete copy of CO & supporting docs-include 3 digit district number (DIS) to assist with CST change order reviews (All Change Orders should include documentation of the following: form 2146 or equivalent, concurrence of reason code, federal participation, funding category, signed force account form 316, environmental clearance and form 1295 if applicable)

**DIS xxxCSJxxx CO#01 Plan Sheets** - final approved additional plan sheets if applicable

**YYYYMMDD CO#01 "subject"** - any and all Change Order working documents

**CO 02** - follow same format used for CO 01 folder

**DIS xxxCSJxxx CO#02** - Complete copy of CO & supporting docs-include 3 digit district number (DIS) to assist with CST change order reviews (All Change Orders should include documentation of the following: form 2146 or equivalent, concurrence of reason code, federal participation, funding category, signed force account form 316, environmental clearance and form 1295 if applicable)

**DIS xxxCSJxxx CO#02 Plan Sheets** - final approved additional plan sheets if applicable

**YYYYMMDD CO#02 "subject"** - any and all Change Order working documents

**6 PROJECT DOCUMENTATION**

**6.01 Pay Item Support** - create sub folders for line numbers as needed; refer to Project Records Checklist for additional guidance



## Example Search: subcontractor



**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*

- 1.02 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 Operator; 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**





- 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		
<i>Enter search word above to filter folders. Delete entry to start new search.</i>		
FOLDER	DESCRIPTION	
3.05	Change Orders (2146, 1295)	
4.01	Change Order Summary Report	

Example Search:  
time

time		
<i>Enter search word above to filter folders. Delete entry to start new search.</i>		
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

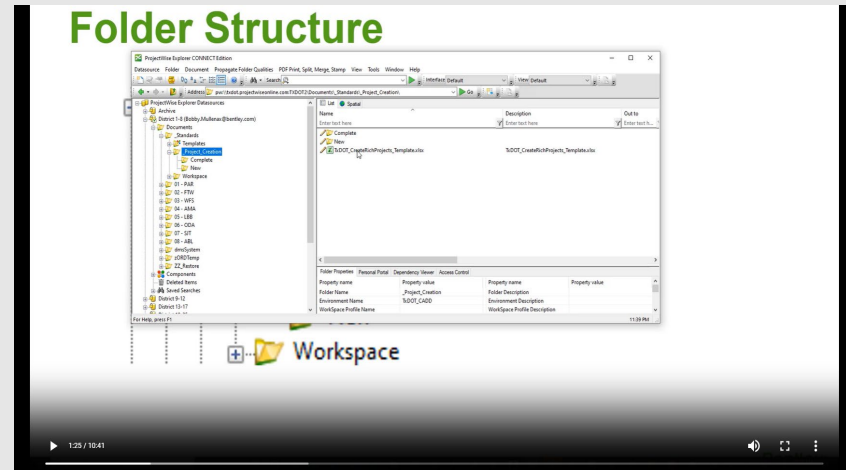
The screenshot shows the Crossroads website interface. At the top, there are navigation links for TxDOT.gov, Administration, PeopleSoft, and TxDOTNowService. Below this is the Crossroads logo and a secondary navigation menu with links for Apps, Districts, Divisions, Resources, and Safety. The main content area is titled 'Recordkeeper Development Program' and includes a description of the program's purpose. Below the description, there are three columns of links: 'Recordkeeper tool box', 'Manuals and processes', and 'Resources'. In the 'Recordkeeper tool box' column, the link 'Project File Index' is highlighted with a yellow background, and a red arrow points to it from the right.



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

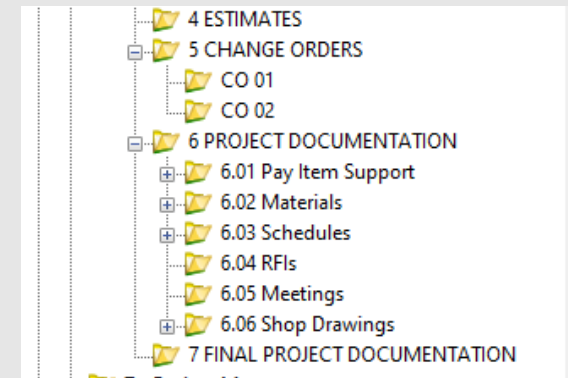
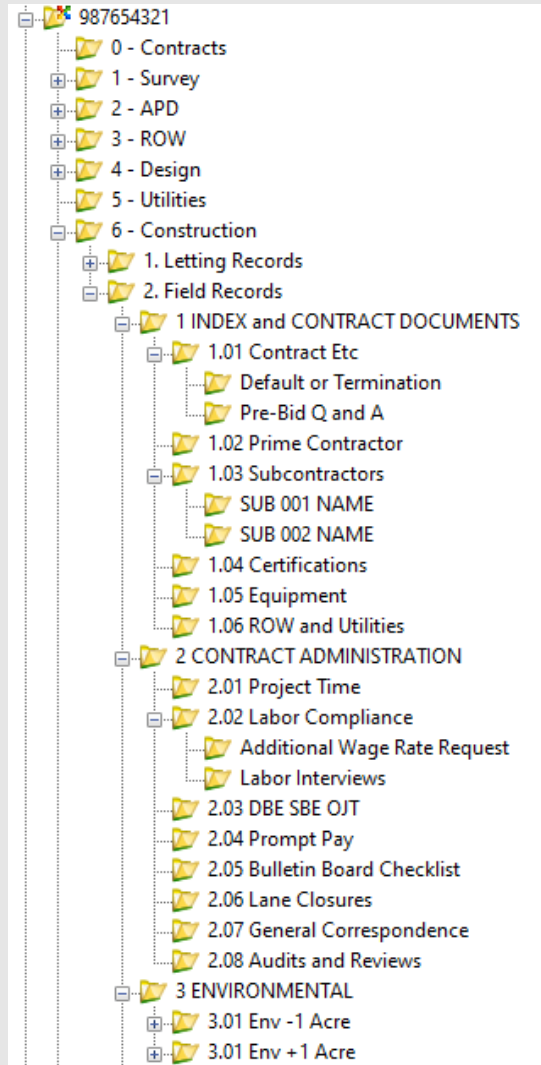
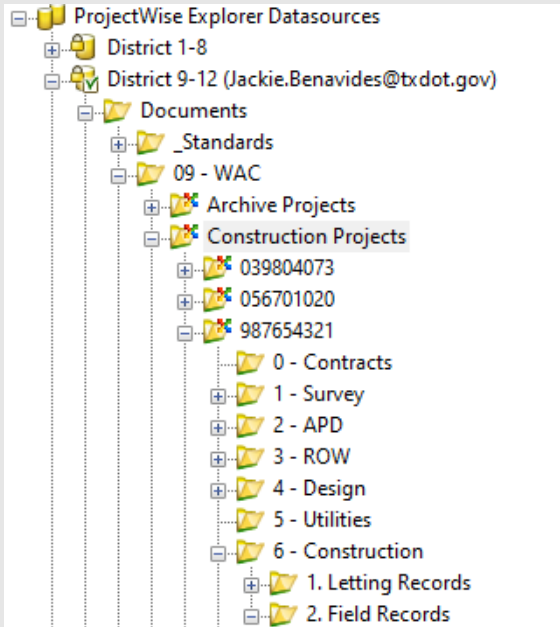
Visit the [ProjectWise Support](#) page for instructions on how to build the folder structure into your NEW projects. Video and written directions available.

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



**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



# QUESTIONS



Please email: [cst-constructionsupport@txdot.gov](mailto:cst-constructionsupport@txdot.gov)