Purpose:

The purpose of this Standard Operating Procedure is to ensure that all folders on the project folders on the "P" drive are organized and maintained in a consistent manner.

1) Every project has its own folder on the "P" drive (P:\all projects). This folder includes 10 – Preliminary & Estimating, 15 – Dead Projects, 20 – Current Projects, and 25 – Completed Projects. Projects that have not yet been awarded should be in 10 – Preliminary & Estimating.

2) If a project does not yet have a project folder, create one.

   A) Make a copy of the New Project Sheet and add the project to the file name (ex. "New Project Sheet – Project ABC"). Complete all the information. Send the completed form to the Office Administrator and request a new project number.

   B) Copy and paste the Job Template Folders – Regular Job folder and rename it with the job number (ex. "12345 – Project ABC"). If you already have project files and do not yet have a job number, paste the copied folder in the Projects – No Job Number folder, and then move the folder once a job number has been assigned.

3) Folders typically used during the preconstruction phase include Bids Accepted, Drawings and Specifications, Financial and Contracts, Office Estimate, Photographs, Pre-Con & Post Job Meetings, and Preliminary. Below are procedures for each folder.

   A) Bids Accepted: After final pricing all subcontractor and material bids that were used in the final estimate shall be copied and pasted here for the project manager to use in writing subcontracts.

   B) Drawings and Specifications: Within this folder are four (4) folders that include 00 PRELIMINARY PHASE, 10 BID PHASE, 20 CONSTRUCTION PHASE, and 30 CLOSEOUT PHASE. See Section 4.104 Bid Document Organization for more information on storing files in these folders.

   C) Financial and Contracts: All contract documents are kept in this folder. If we have a preconstruction agreement, it would be filed in this folder.

   D) Office Estimate: The final contract estimate will be saved in this folder for use by the project operations team.

   E) Photographs: Job related photographs should be saved here for future reference. Create a folder within called "Preconstruction" for all preconstruction related photographs.

   F) Pre-Con & Post Job Meetings: Notes from the Pre-Construction meeting (with Crain precon & operations teams) are saved in this folder. See Section 4.301 – Preconstruction Meeting for additional information.

   G) Preliminary: The Preliminary folder all notes, spreadsheets, templates, subcontractor bids, and proposals are stored. Folders within the Preliminary folder include:

      i. 01 Estimator Notes: All estimating notes and spreadsheets are kept here. Feel free to create additional folders within as necessary (ex. Value Engineering, Escalation, etc.)

ii. 02 Proposals: Within this folder are folders related to each potential phase of preconstruction.

1. Feel free to create or omit folders as necessary.
2. If there are no preconstruction phases (only a bid), delete all sub-folders.
3. *** If there are revisions to a proposal (final bid, for example), create a folder that says "VOID" for old proposals. The intent here is when we open "04 Final Proposal" the most current proposal is the only file(s) available.

iii. 03 Bids: Subcontractor and material supplier bids are saved in this folder. Like the 02 Proposals folder, sub-folders are included, and should be managed the same way.

iv. Templates: Templates should be used for a consistent Crain branding and professionalism, as well as offering guidance on typical clarifications, breakdowns, etc.

4) Upon completion of the preconstruction phase, move the project folder to the appropriate location.

A) If we were not awarded the project, move the folder to the correct series folder in "15 – Dead Projects," and file within the appropriate year series (ex. 22797 – Volvo Cool Springs is filed in the "22 Series" folder)

B) If we are awarded the project, move the folder to "20 – Current."