



AIA Best Practices: Keys to classifying project files

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Summary

Renaissance 3 Architects organizes its files using the following classification system. Other firms can follow this structure or create a similar taxonomy to manage project files.

A sample taxonomy

Organizing project files, whether paper or electronic, can be a formidable challenge for any firm. Renaissance 3 Architects, a firm of 15 to 20 employees, has developed the following taxonomy for its project files. Project architects use this checklist at the beginning of every new project, selecting the file folders that are likely to be needed. Administrative and IT staff can then set up the necessary file folders.

3.0 Project Management

- 3.1 Project Directory
- 3.2 Drawing List
- 3.3 Project Checklist
- 3.4 Project Fee Analysis
- 3.5 Project Cost Analysis and Estimates
- 3.6 Project Schedules and Phasing
- 3.7 Building Areas/Statistics
- 3.8 Quality Assurance Reviews
- 3.9 Constructability Reviews
- 3.10 Project Contract Documents
- 3.11 Electronic Drawing Media Release
- 3.12 Drawing/Electronic Media Request Form

Keys to classifying project files

3.13 Project Archiving System

3.14 Project File Organization

4.0 Code/Approvals

Chronological files containing code research, submittals, approvals, and all related correspondence, and transmittals

4.1 State Dept. of Labor Approvals

4.2 Township/City Approvals

4.3 BOCA/Code Research

4.4 Miscellaneous Approvals

5.0 Correspondence

All correspondence arranged in reverse chronological order. All transmittals, unless there are no accompanying pages, are to be stapled to the back of the letter or correspondence with which they are transmitted.

5.1 General Correspondence

Used only for smaller projects, where this is the only correspondence file

5.2 Architect Correspondence

5.3 Owner Correspondence

5.4 Construction Manager / Contractors Correspondence

5.5 Subcontractors Correspondence

5.6 Miscellaneous Correspondence

5.7 Geotechnical/Surveyor Correspondence

5.8 Civil Engineer Correspondence

5.9 Landscape Architect Correspondence

5.10 Structural Engineer Correspondence

5.11 Mechanical Engineer Correspondence

5.12 Electrical Engineer Correspondence

5.13 Food Service Consultant Correspondence

5.14 Audio-Visual Consultant Correspondence

5.15 Technology Consultant Correspondence

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5.16 Tenant Correspondence

6.0 Meeting Reports/Memos/Notes

6.1 Meeting Reports

6.2 O-A-C Meeting Minutes (Owner-Architect-Contractor)

6.3 Miscellaneous Meeting Notes

6.4 Telephone Conversation Memos

7.0 Project Information

7.1 Owner-Provided Information

7.2 Existing Drawings/Photographic Information

7.3 Architectural Information

7.4 Site/Civil Information

7.5 Structural Information

7.6 HVAC Information

7.7 Plumbing/Fire Protection Information

7.8 Electrical Information

7.9 Product/Equipment Information

7.10 Building Environmental Information

7.11 Green Building/LEED Information

8.0 Site

8.1 Site Information / Site Evaluation

8.2 Geotechnical Engineering

8.3 Site Survey

8.4 Site Environmental Assessment

9.0 Predesign

9.1 Existing Conditions Information

9.2 Building and Site Evaluation

9.3 Feasibility Analysis

9.4 ADA Analysis

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10.0 Programming

10.1 Programming Surveys

10.2 Program Information

11.0 Drawings and Supplemental Drawings

11.1 Drawing Logs

11.2 Working Drawings (.dwg)

11.3 X-ref Drawings (.dwg)

11.4 Consultant Drawings (.dwg)

11.4.01 Site and Landscape

11.4.02 Structural

11.4.03 Mechanical

11.4.04 Electrical

11.4.05 Telecommunications

11.4.06 Food Service

11.4.07 Other Consultants

11.4.08 Owner's Consultants

11.5 Plots (pdf)

11.6 Current Set (pdf)

11.7 Transfer and Zip Files

11.8 Manufacturer Downloads

11.9 Images

11.10 Miscellaneous Drawings

11.10.01 Design Sketches

11.10.02 Presentation Sketches

12.0 Specification Data

12.1 Specification Outline and Miscellaneous Data

12.2 Division 1-General

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12.3 Division 2–Site

12.4 Division 3–Concrete

12.5 Division 4–Masonry

12.6 Division 5–Metals

12.7 Division 6–Wood and Plastic

12.8 Division 7–Thermal and Moisture Protection

12.9 Division 8–Doors and Windows

12.10 Division 9–Finishes

12.11 Division 10–Specialties

12.12 Division 11–Equipment

12.13 Division 12–Furnishings

12.14 Division 13–Special Construction

12.15 Division 14–Conveying Systems

12.16 Division 15–HVAC, Plumbing, and Fire Protection

12.17 Division 16–Electrical

13.0 Specifications

13.1 Outline Specification

13.2 Full Form Specification

13.3 Small Project Form Specifications

14.0 Bidding / Construction Procurement

14.1 Bidders Lists

14.2 Bid Tabulation/Bids

14.3 Subcontractor Scope Letters/Invitation to Bid

14.4 Contractor Selection/Qualifications

14.5 Miscellaneous Correspondence

15.0 Construction Administration

15.1 Requests for Information

15.2 Addenda

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15.3 Modifications/Supplemental Instruct/Construction Change Directives

15.4 Change Orders

15.5 Supplemental Drawings

15.6 Applications for Payment

15.7 Certificate of Substantial and Final Completion

15.8 Project Record Documents

15.8.01 Record Specifications

15.8.02 Record Drawing Set

15.9 Construction Progress Documentation

16.0 Submittals

16.1 Submittal Logs

16.2 Test Reports

16.3 Submittals–Division 1–General

16.4 Submittals–Division 2–Site Construction

16.5 Submittals–Division 3–Concrete

16.6 Submittals–Division 4–Masonry

16.7 Submittals–Division 5–Metals

16.8 Submittals–Division 6–Wood and Plastics

16.9 Submittals–Division 7–Thermal and Moisture Protection

16.10 Submittals–Division 8–Doors and Windows

16.11 Submittals–Division 9–Finishes

16.12 Submittals–Division 10–Specialties

16.13 Submittals–Division 11–Equipment

16.14 Submittals–Division 12–Furnishings

16.15 Submittals–Division 13–Special Construction

16.16 Submittals–Division 14–Conveying Systems

16.17 Submittals–Division 15–Mechanical

16.18 Submittals–Division 16–Electrical

17.0 Punchlists

17.1 Punchlists, Sitework

17.2 Punchlists, Architectural

17.3 Punchlists, MEPS

17.4 Punchlists, Food Service

17.5 Punchlists, Other

About the contributor

This Best Practice is a contribution of SDA (Society of Design Administration).

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This article corresponds to:

Architect's Handbook of Professional Practice, 15th edition Unit 1 - The Profession

Chapter 05 – Organizational Development

Section 12 – Information Management and Services