

FILE NAMING CONVENTION

DESCRIPTION	SOURCE documents (PDF if source is paper)	SENT TO FTP SITE or PUBLISHED TO INTERNET AS	COMMENTS
Tender	####-YYYY_Tender.docx eForm_A_Bid_Proposal.pdf eBid_FormB.xls ####-YYYY_Form_N-Detailed_Specifications.pdf	####-YYYY_Tender.pdf ####-YYYY_Form_A-Bid_Proposal ####-YYYY_Form_B-Prices ####-YYYY_Form_N-Detailed_Specifications.pdf	for Tender documents for documents with SUBMISSION on MERX (same form for both Tenders and RFP's) for Tender documents with SUBMISSION on MERX for Tender or RFP documents with Submission on MERX
Request for Proposal	####-YYYY_RFP.docx eForm_A_Bid_Proposal.pdf eBid_RFP.xls	####-YYYY_RFP.pdf ####-YYYY_Form_A-Bid_Proposal ####-YYYY_Form_B-Fees	for RFP documents (bid submission no longer included in template) for documents with SUBMISSION on MERX (same form for both Tenders and RFP's) for RFP documents with SUBMISSION on MERX
Request for Qualification	eForm_A_RFQ.pdf	####-YYYY_Form_A-RFQ.pdf	for Request for Qualification Submission on MERX
Request for Expression of Interest	eForm_A_RFEOL.pdf	####-YYYY_Form_A-RFEOL.pdf	for Expression of Interest Submission on MERX
Specifications in NMS format	####-YYYY_NMS_Format_Specifications.docx	####-YYYY_NMS_Format_Specifications.pdf ####-YYYY_NMS_Division-#X.pdf ####-YYYY_NMS_Section-#XXXX.pdf	If supplied separately
Drawings	- '@@@@' is the drawing number or name - 'R@' is the drawing revision level - replace '#' with the sheet number - R0 used for non-revised drawings	####-YYYY_Drawing_@@@-R@.pdf or ####-YYYY_Drawing_@@@-Sht#-R@.pdf or ####-YYYY_Drawing_@@@-Sht#-R@.pdf	Each drawing must be uniquely identified on its face. Drawing files names are derived from the information on the document. Use the City drawing number, if available, otherwise use Consultant drawing number. Where neither is available use the drawing title. The latest revision number in the revision block goes after the R in the file name. Use R0 for a non-revised drawing. If revision dates are used instead of revision numbers then presume a number for each date or entry.
Test hole logs not embedded into the document	####-YYYY_Test_Hole_Logs.pdf	####-YYYY_Test_Hole_Logs.pdf	If Cover Sheet does not have a drawing number
Video	####-YYYY_Video_@@@.avi	####-YYYY_Video_@@@.avi	If supplied separately
Pictures not embedded into the document	####-YYYY_Picture_@@@-R@.jpeg	####-YYYY_Picture_@@@-R@.jpeg	
Public/posted opening results	Merx Bid Results	####-YYYY_unevaluated_Posted_Opening_Results.pdf	ForTenders that have been verified.
Evaluated Public/posted opening results	Merx Bid Results	####-YYYY_Evaluated_Posted_Opening_Results.pdf	
Respondents to Request for Proposal and Quotations	####-YYYY_Respondents_to_RFX.doc	####-YYYY_Respondents_to_RFX.pdf	Posted after RFX award - names of companies only. Respondents_to_RFX.pdf where X is any character.
Addendum	####-YYYY_Addendum_#.docx	####-YYYY_Addendum_#.pdf	
- # is the addendum number			
Revised Documents issued with Addendum	####-YYYY_Addendum_#-Tender.docx	####-YYYY_Addendum_#-Tender.pdf	This document summarizes all the revisions and must be issued with each addendum.
	####-YYYY_Addendum_#-Bid Proposa	####-YYYY_Addendum_#-Bid Proposa	This section is re-issued as a complete document if it includes Form A & Form B. Documents with SUBMISSION on MERX are issued separately.
	eBid_FormB.xlsx	####-YYYY_Addendum_#-Form B-Prices	documents that are on MERX are issued individually
	eBid_RFP.xlsx	####-YYYY_Addendum_#-Form B-Fees	documents that are on MERX are issued individually
Revised Specifications in NMS format with Addendum #	####-YYYY_Addendum_#-NMS_Specifications.docx	####-YYYY_Addendum_#-NMS_Division-#X.pdf ####-YYYY_Addendum_#-NMS_Section-#XXXX.pdf	Re-issue the sections where renumbering of clauses or pages have occurred and/or cross referencing has been affected. Include revised Table of Contents.
Revised or additional Drawings with Addendum	####-YYYY_Addendum_#-Drawing_@@@-R@.pdf	####-YYYY_Addendum_#-Drawing_@@@-R@.pdf	
Revised or additional Test hole logs with Addendum	####-YYYY_Addendum_#-Test_Hole_Logs.pdf	####-YYYY_Addendum_#-Test_Hole_Logs.pdf	
Revised or additional Videos with Addendum	####-YYYY_Addendum_#-Video_@@@.avi	####-YYYY_Addendum_#-Video_@@@.avi	
Revised or additional Pictures with addendum	####-YYYY_Addendum_#-Picture_@@@-R@.jpeg	####-YYYY_Addendum_#-Picture_@@@-R@.jpeg	
Data supplied by Vendor e.g. previous purchases, etc.	####-YYYY Vendor Data YYYY MM DD.xlsx		
Contract information (before award)	####-YYYY Contract Info.docx		
Working copy of Tender/RFP	####-YYYY Tender/RFP Working Copy #.docx		Only in Work in Progress folder (see note 3 below)
Working copy of Tender/RFP addendum	####-YYYY Addendum # Working Copy #.docx		Only in Work in Progress folder (see note 3 below)
Data source for Tender/RFP	####-YYYY Data Source.docx ####-YYYY Data Source.xlsx		
Tender/RFP/Bid opportunity notice	####-YYYY Bid Opportunity Notice.docx ####-YYYY Bid Opportunity Notice.pdf		
Bid records	####-YYYY Bid Records.docx		waiting on decision on posting of unevaluated and evaluated opening results
Bid receipt record (evaluated by Contract Administrator)	####-YYYY Bid Receipt Record(evaluated).pdf		waiting on decision on posting of unevaluated and evaluated opening results
Bid receipt record	####-YYYY Bid Receipt Record.pdf		Download from MERX
Bid receipt record From MERX	####-YYYY MERX Bid Receipt.pdf		
Bid (use company short name, use next available numeric suffix (#) if necessary for alternate bids)	####-YYYY Bid Company Name #.pdf		
Bid extension letter	####-YYYY Bid Extension Letter ## (signed Company Name).xlsx		Bid Extension letter has been signed by the Company
Bid evaluation workbook	####-YYYY Bid Evaluation.xlsx		Your evaluation spreadsheet that has been reviewed by an Analyst Trainer
Bid evaluation workbook - Checked by Analyst/Trainer	####-YYYY Bid Evaluation-C.xlsx		Contract Administrator verifies the pricing from Merx to Form B Prices/Fees
Bid evaluation workbook - Checked by Contract Administrator	####-YYYY Bid Evaluation-CA.xlsx		Bid Evaluation that contains a matrix
Bid evaluation workbook - Matrix	####-YYYY Bid Standard Scoring Matrix		Bid Evaluation matrix with New information received after Interviews
Bid evaluation workbook Consensus Matrix After Interview	####-YYYY Bid Standard Scoring Consensus(interview)		Bid Evaluation Final Decision
Bid evaluation workbook - FINAL Decision	####-YYYY Bid Evaluation Final.xlsx		
Modified version of bid evaluation workbook	####-YYYY Bid Evaluation-R@.xlsx		
- @ is the revision level			
Working copy of bid evaluation workbook	####-YYYY Bid Evaluation Working Copy #.xlsx		Only in Work in Progress folder (see note 3 below)
Communication, e.g., letter, memo, e-mail, fax	####-YYYY Com ##.docx		Jan 2019 shortened from Communication to Com.
- ## is the communication number			
- includes, note to file, documented telephone conversation, etc. (Award Letter has its own naming convention)	####-YYYY Com ##.txt ####-YYYY Com ##.htm ####-YYYY Com ##.pdf		
Attachment to Communication ##	####-YYYY Com ##a.docx ####-YYYY Com ##b.xlsx ####-YYYY Com ##c.pdf ####-YYYY Com ##d.wpd		
Communication e.g., letter, memo, e-mail, fax re: Liquidated damages	####- YYYY LDA ##.docx		Approval by Materials Management to remove Liquidated
- ## Differentiates the LD requests	####- YYYY LDA##.msg		
Any E-mail sent to Bid Evaluator/CA with comments & link to bids	####-YYYY Bid Transmittal ##.msg	RECORDS NOT PUBLISHED TO INTERNET	Bid Information sent to the Contract Administrator.
Communication re: Materials Management Bid Certification	####-YYYY Bid Security Certification.pdf		
Debriefing of a Bidder e.g., documented phone conversation	####-YYYY Debrief.docx/.msg		Debrief a bidder after the award of contract. Must be in the file if bidder is non-responsive. Must include date and time & who you spoke to.
Pre-Approval from CIO (re: IT Purchases)	###-YYYY IST Approval		Communication from the CIO Approving a expenditure & Cloud
Approval from Cloud Committee	####-YYYY Cloud Review and Cloud Approval		File requires two emails. 1. Review email and 2. the Approval from City-Cloud-Review-Group.
Report (including Recommendation of Award)	####-YYYY Report #.docx		Includes reports going to Award Authorities
- # differentiates report types and versions of reports			
Report Working Copy	####-YYYY Report # Working Copy #.docx		Only in Work in Progress folder (see note 3 below)
MATMGT approval (or non-approval) of Award Report #	####-YYYY Report #-M.docx		Comments on Award Report (not really an approval)
Legal Services approval (or non-approval) of Award Report #	####-YYYY Report #-L.docx		Comments on Award Report (not really an approval)
Risk Mgt. approval (or non-approval) of Award Report #	####-YYYY Report #-R.docx		Comments on Award Report (not really an approval)
Manager of Materials approval of Report #	####-YYYY Report #-MM approval.docx		Final Approval from Award Authority if Manager of Materials
Department Head approved copy of Report #	####-YYYY Report #-Dept approval.docx		Final Approval from Award Authority if Department Head or Approval by Director on reports where they're included in the concurrence section, & the report is sent on to the CAO
Reports from Directors going to CFO and beyond for Approval	####-YYYY Report #-Final		Final report from Dept to CFO and beyond, needs approval
Controller Approval of Report #	###-YYYY Report #-F.docx		Financial Impact Statement reviewed and approved by Dept. Controller
CFO approved copy of Report #	####-YYYY Report #-CFO approval.docx		Final Approval from Award Authority if CFO
CAO approved copy of Report #	####-YYYY Report #-CAO approval.docx		Final Approval from Award Authority if CAO
Council Minute approving Report #	####-YYYY Report #-Council approval.docx		Final Approval from Award Authority if Council, EPC or Standing Committee
Report Over-Expenditure	####-YYYY Report #-OE.docx		Award Reports for Over Expenditure
Letter from Legal having received Insurance and Security from Contractor	###-YYYY Legal Contract Memo.docx		Letter, email, memo from Legal having received Insurance and Security from Contractor
Award Letter received from Departments	###-YYYY Award Letter.docx		
Contract Document Transmittal Process (former Formal Contract)	####-YYYY Contract_Documents		Using the Tender/RFP/Bid Opportunity number
Award Letter Draft with Link and Password	####-YYYY Com ##b (LOA DRAFT)		Award Letter with Link and password
Communication to Dept (with Award Letter)	####-YYYY Com ## (Draft LOA for review)		Save email to dept with Draft Award Letter and Link
Letter of Regret (RFPs)	####-YYYY LOR (company name)		Letter of Regret to unsuccessful bidders.
Disposal form	Disposal Form eeee.pdf		
- eeee is the disposal form number			
Purchase order	PO#####.pdf		As directly generated from PeopleSoft
- ##### is the purchase order number	PO##### signed.pdf		PeopleSoft signed PO (imaged copy)
Change order to Purchase Order #####	PO#####co#.pdf		As directly generated from PeopleSoft
- # is the change order number	PO#####co# signed.pdf		Old paper or PeopleSoft signed CO (imaged copy)
PeopleSoft contract	Contract#####.pdf		As directly generated from PeopleSoft
- ##### is the contract number	Contract##### signed.pdf		PeopleSoft signed Contract (imaged copy)
Change order to PeopleSoft Contract #####	Contract#####co#.pdf		As directly generated from PeopleSoft
- # is the change order number	Contract#####co# signed.pdf		As directly generated from PeopleSoft

FOLDER NAMING CONVENTION for TRANSAC FILES

FOLDER CONTENTS	FOLDER NAME	COMMENTS
Transaction folders for the stated year	YYYY (year)	
Finalized transaction folders and files for record purpose	RECORDS	
Unaltered documents from FTP site on date indicated	FTPYYYY-MM-DD (within RECORDS)	
Unaltered documents from FTP site on same date	FTPYYYY-MM-DD-R@ (within RECORDS)	
Unaltered documents via Email on date indicated	emailYYYY-MM-DD (within RECORDS)	
Unaltered documents via Email on date indicated	emailYYYY-MM-DD-R@ (within RECORDS)	
Bids & evaluation spreadsheet	####-YYYY Bids (within RECORDS)	Bids from Merx each individual folder has Bidders name (from Merx)
Rejected Bids & explanatory documentation	####-YYYY Bids Rejected (within RECORDS)	Includes withdrawn, replaced, and unacceptable bids
Working Transaction folders and files	WORK IN PROGRESS	Folder should be empty after the bidding process unless it contains files for a related future Tender/RFP
Tender/RFP documents, drawings, etc.	####-YYYY (within WORK IN PROGRESS)	Folder moved to Web site when documents ready
Bids & evaluation spreadsheet	####-YYYY Bids (within WORK IN PROGRESS)	Folder copied to Bids Web site & move to the RECORDS folder when documents ready
Addendum with any revised or additional documents	####-YYYY ADDENDUM # (within WORK IN PROGRESS)	Folder moved to Web site when documents ready
documents from FTP site on date indicated	FTPYYYY-MM-DD (within WORK IN PROGRESS)	Contents checked and moved into either WORK IN PROGRESS or ####-YYYY folder then folder deleted
Additional documents from FTP site on same date	FTPYYYY-MM-DD-R# (within WORK IN PROGRESS)	Contents checked and moved into either WORK IN PROGRESS or ####-YYYY folder then folder deleted
documents via Email on date indicated	emailYYYY-MM-DD (within WORK IN PROGRESS)	Contents checked and moved into either WORK IN PROGRESS or ####-YYYY folder then folder deleted
Additional documents via Email on date indicated	emailYYYY-MM-DD-R# (within WORK IN PROGRESS)	Contents checked and moved into either WORK IN PROGRESS or ####-YYYY folder then folder deleted

FOLDER NAMING CONVENTION for TRANSFER FROM DEPARTMENTS & CONSULTANTS

FOLDER CONTENTS	FOLDER NAME	Variable Legend (symbols must be replaced)	notes:
Tender/RFP documents, drawings, etc.	####-YYYY or ####-YYYY A or ####-YYYY B	YYYY = Year variable MM = Month Variable DD = Day Variable	1) Try to keep individual file size under 10MB.
Addendum with any revised or additional documents	####-YYYY_ADDENDUM #	# = numeric value @ = alpha and/or number variable	2) Working copy naming convention is to add "Working Copy #" at the end of the normal name prior to the file extension. Working copies must remain in WORK IN PROGRESS. Finalized documents must be renamed (no longer working copy) and moved to RECORDS, in the original format (e.g. Word - .docx). Delete unnecessary working copies.

Last Revised: April 2022