



WMU File Naming Convention

General

The purpose of this document is to provide direction for standardizing format and naming of electronic files. This file naming convention shall be followed by everyone contributing project related files to WMU FM. It is the responsibility of the author or the contracted party to name all files requiring review and approval according to this convention prior to their distribution. This is critical for clear delineation of document status and issue changes throughout the project. The WMU project manager shall review naming upon receipt of documentation prior to further circulation or saving to the project folder, requesting immediate adjustments as required.

Direct any questions or comments to Facility Records, FM-FacilityRecords@wmich.edu.

File Naming Structure

File names shall consist of 5 fields separated by 4 underscores. When no relevant information corresponds to a specific field, that field can be left blank by creating a double underscore. A space must be used between each word or item in the name. Although our database is not case sensitive, capitalizing the first letter of each word or acronym is preferred for readability. Use alphanumeric text only, with exception to underscores, spaces, decimal points and hyphens, as outlined in this document. Key words and acronyms identified in **Bold Red** text in this reference must follow exact spelling and spacing (e.g. **As Built** not AsBuilt or As-Built, **IOM** not OIM or O&M). Limit field length to 25 characters in field 2 and 50 in field 3.

Field 1 _ Field 2 _ Field 3 _ Field 4 _ Field 5

Field 1: The physical **Location** on campus related to the file content. Use the **assigned 3 digit building number** for all single buildings and any specific project associated sites. Up to 6 building numbers can be used with a space between. **Multi Bldg** must be used for 7 or more buildings. Use **Site** for site files unassociated with a specific building. Use **Util** for files associated with utility(s) outside of the building envelope. Use **WMU** when a file references more than one major location category (buildings, sites, utilities), for example a Master Plan.

Field 2: The **Sub-Description or Sub-Location** shall contain one of the following when relevant to the file:

1) **Classification** – for submittals, warranties and IOMs (Installation, Operation, and Maintenance Manuals):

External Contractor: use CSI # excluding spaces, include any decimal point with additional numbering, follow CSI # with a decimal point then submittal # (eg. **092513.13.03b**, **083613.02**).

WMU FM staff only: may classify by general discipline or system (e.g. **Civil**, **Mech**, **Elect**, etc.).

2) **Document Number** – use numeric / alphanumeric document designation for sequential ordering. Use sheet number including any decimal or hyphen for individually issued drawings. Use **Set** for multi sheet documents.

3) **Sub-location** – use WMU assigned room or floor designations for **Buildings**; use established **site specific name** when designated or categorize by **Hrdscp** (hardscape) or **Lndscp** (landscape) for **Site**; use specific utility system designation (e.g. **Steam**, **Elect**, **Storm Sewer**, etc.) for **Utility** or **Multi Util** for documents relating to multiple utility systems.

Field 3: The **WMU Project Number** followed by a **decimal point** then file **Description**. Description is two part:

1) Content Description (Name, Title, Subject, etc.) followed by 2) Document Type (e.g. **Bid**, **CO**, **RFI**, **IOM**, etc.).

Field 4: The **Status** shall contain the following when relevant to the file: 1) **Action Status** shall be used for submittals, RFIs, change orders, payment related documents etc. 2) **Issued For Status** shall be used for all drawings. Include both “action” and “issued for” status when applicable (e.g. **Approved As Built**).

Field 5: The **Date** issued. Date format shall follow: **yyyy mm dd**.

Zipped Folder Naming Convention (option available to WMU Staff only)

Entire sub-folders may be zipped and named to convention as follows: Follow the individual file naming convention except for Field 2, which will adopt the associated Parent Folder Name, follow optional Field 2 description with the Sub-Folder Name being zipped. Leave field 4 blank.

Field 1 _ Parent Folder Name _ Project #.Description followed by Sub-Folder Name _ Blank _ Field



Tabular File Naming Convention

Field 1	Field 2	Field 3		Field 4	Field 5
Location	Sub-Description or Sub-Location	WMU Proj. No.	Description	Status	Date
<p>Buildings: Use: ### assigned 3 digit bldg number(s) for up to 6 buildings with a space between each building # for files specific to buildings, or Use: Multi Bldg For 7 or more bldgs.</p> <p>Site: Use: ### assigned 3 digit building number(s) for site files clearly associated with a specific building; especially when the site is part of a building's original construction package. Use: Site for files unassociated with a specific building.</p> <p>Utility: Use: Util for files associated with utility system(s) outside of the building envelope.</p> <p>Campus Wide: Use: WMU for files referencing multiple location categories (buildings, sites, utilities) eg. master plans, special events, campus wide testing or deferred maintenance.</p>	<p>Sub-description: Classification: For Submittals, Warranties and IOMs (installation, operation, maintenance): External Contractor: use CSI #, excluding spaces, include any decimal point with additional numbering, follow CSI # with decimal then submittal # (eg. 092513.13.03b, 083613.02). WMU FM staff only: may use general discipline or system: Civil, Lndscp, Arch, Struct, Mech, Elect, Plumb, FireAlm, Life Safety, Security, TCom, Furniture, Fixtures, Equipment, Finishes, Signage, Commissioning Cx.</p> <p>Document Number: For Drawings use sheet number including any decimal or hyphens for individual sheets (e.g. A101, M-2, P2.1). Use Set for multiple sheet documents. For Documents such as RFIs & COs use: sequential number only.</p> <p>Sub-location: Buildings: Use room or level designation: Room number(s) when specific to a room or a series of rooms. Include any hyphens. (e.g. 1103, F-237, 1229 1231, 2059 to 2066). Level(s) when multiple rooms or levels relate (e.g. B1, B2, 01, 02, MZ). Site: Use <i>established</i> site specific names, parking lot numbers, or road names when designated (eg. Lot 34, Valley Dr, 9th ST, Asylum Preserve, Fountain Plaza, GV Pond, Kleinstuck, Orchards, Parkview, West Roundabout, Icon Roundabout). Non-Site or Bldg Specific Use: Hrdscsp for (bike paths, sidewalks, parking lots, roads, streets) or Lndscsp for (constructed foot bridges, gazebos, etc. or planted areas). Utility: Use system: ChWtr, Elect, NGas, SanSwr, Steam, StmSwr, TCom, Tunnel, Water Use: Multi Util for two or more utility systems. Campus Wide: Choose from appropriate sub-locations above.</p>	<p>Project Number Pyy####</p> <p>Notes for internal WMU FM staff:</p> <p>Project Number Nomenclature:</p> <p>Current Projects: All FM starting 2013: Pyy#### P140025 - 25th project requested in 2014</p> <p>Historic Projects: 2015-2018 "D" or "C" used to distinguish design from construct P150025C, P150025D</p> <p>Remodeling from 1998–2009 - Ryy## 2009–2013 - Ryy#### R9814 - 14th project requested in 1998 Any of these remaining open in 2013 received "L" indicating Legacy LR9814</p> <p>CFD (campus facility design) 1969 – 2009: yy#### 92103 - 103rd project requested in 1992</p> <p>Vendor Project Numbers: use only with files related to acquired buildings, sites, utilities, etc. with no record of an associated WMU Project Number.</p>	<p>Period</p> <p>Start with Content Description: Use the specific Name, Title, or Subject provided on the document. Describe content when this information is not clearly outlined.</p> <p>Follow with Document Type: Scope, Schedule, Budget, Guidelines, Standards, Study, Form, Email, Letter, Memo, MtgMin, Request(s) for qualifications RFQ, for proposal RFP, RFI for information, Proposal, Contract, Bid, Quote, Invoice, Receipt, Change Order CO, Purchase Order PO, Work Order WO, Dwg, Spec, Map, Photo, Survey, Submittal, Shop Dwg, Report, IOM, Punchlist, Test, Warranty</p> <p><i>Do not use building names or acronyms, field 1 provides primary location.</i></p> <p><i>Do not use staff names or initials of specific individual occupants. Use room or level designations instead.</i></p> <p><i>Use room or level numbers instead of terms to describe the room function (e.g. Lobby, Lounge). The room function may change over time or be described differently from person to person. WMU Project Team to verify room numbers and communicate accurately in drawings and other documentation throughout project.</i></p> <p><i>Incorporate Sub-location in Content Description when relevant and Field 2 is utilized for Sub-description (e.g. Rm 3006 Finish Plan, Level 02 Renovation).</i></p> <p><i>Start description with vendor name when including in description.</i></p> <p><i>Do not be too brief or generic. The description shall provide as much relevant content information as possible.</i></p>	<p>Action Status: For Submittals use: Submitted, Rejected, Resubmit, Resubmitted, or Approved For RFIs use: Submitted or Response For Change Orders use: Submitted or Approved other Payment related use: Submitted, Approved, or Paid For Work Orders use: Open or Closed For Drawings and Other use: Reviewed, Approved</p> <p>Issued For Status: For Drawings and Specs use: issued status (e.g. Prelim, Review, 50 SD, 90 DD, 100 CD, Bid Pack 2, Bull 1, Add 2, Rev 1, As Built, Record)</p> <p><i>Include "action" and "issued for" status when applicable (e.g. Approved As Built).</i></p> <p><i>Precede status with any reviewing party (e.g. Fire Marshal Approved, Owner Reviewed 90 DD).</i></p> <p><i>Document content shall have proof of action or issue status contained in transmittal, title block, or elsewhere. This includes IOM submittals. Approved status requires ALL required approvals are indicated on attached transmittal letter.</i></p>	<p>Underscore</p> <p>yyyy mm dd 2019 03 28</p> <p>2016 03</p> <p>2008</p> <p><i>The file name date shall reflect the date of the file contents not the file properties.</i></p> <p><i>When document content contains multiple dates due to revisions, approvals, etc., use the most recent date.</i></p> <p><i>Ignore manufacturer publication dates, use the date the file is submitted.</i></p> <p><i>Leave blank if not dated or issued.</i></p>



Examples	
Document Type/File Name / Hypothetical Folder Designation	Document Description or Notes
Product Data Submittal - Approved 006_09900_00002.Paint Product Data Submittals_Approved_2002 03 13 00002-Seelye Athletic Ctr\4. T&C\SUBM	Letter of Transmittal w/ Description: Paint product data submittals dated 3/13/02 for Job No. 00704. Next page stamped, signed and checked approved by Architects dated 3/12/02 followed by the paint product data. The WMU project number 00002 and the CSI #09900 was not incorporated into the document content as it should be, but included in the file name.
Shop Drawing Submittal 138_211200_R8953.234 Fire Suppression System Shop Drawings_Submitted_2011 05 17 R8953- Sangren Hall\3. CNST\SUBM	Set of shop drawings from Total Fire Protection dated on title block 4-27-2011. Submittal cover from Miller-Davis Co. Submittal No: 234, Revision No: 0, Sent Date: 5/17/2011, described: 211200 - Fire Suppression System Shop Drawings stamped approved as noted 05/17/11 by Miller Davis Only
Shop Drawing Submittal - Resubmit 138_211200.234_R8953.234 Fire Suppression System Shop Drawings_Resubmit Rev1_2011 09 15 R8953 - Sangren Hall\3. CNST\SUBM	Same set of shop drawings revised. Submittal cover from Miller-Davis Co. numbered: 234, Revision No: 1, Sent Date: 8/1/2011 stamped approved 08/01/11 by Miller Davis, checked and dated 9/15/2011 correct as noted, revise and resubmit by Architect
Shop Drawing Submittal - Approved As Built 138_211200.234_R8953.234 Fire Suppression System Shop Drawings_ Approved As Built_2011 10 21 R8953 - Sangren Hall\4. T&C\SUBM	<i>*The last example (named differently) was accepted and filed as the final approved submittal at turnover. Hypothetically dated, this example should have been received and filed as shown in the current folder structure. In this case, the title blocks would be checked As-Built</i>
Product Data Submittal - Approved 165_175_202923.35_R10155.Variable Frequency Controllers Submittal_Approved_2014 04 29 R10155-Western Heights\4. T&C\SUBM	Submittal No: 35 stamped by CM "Approved" on 4/22/2019, stamped by Architect "Approved as corrected" on 4/29/2014 and stamped by Engineer "Note Markings" on 04/23/14 with updated Spec No. 20 2923 in red along with various other red and blue updates.
As Built - Contractor provided 009_Set_P180055.Moore Electric eSports Phase 2 Drawings_As Built_2018 09 24 P180055- eSports Gaming Complex\4. T&C\ASB	Drawing set named: eSports at Little Theatre Phase 2 issued on June 18, 2018 by Tower Pinkster. Drawings are red-lined indicating As Builts, Moore and various field changes. Actual date red-lined should be, but was not indicated, but property date established a reasonable date of transmittal of 2018 09 24 that should be adopted rather than using the TP Issue Date
Record Drawing – AE provided 174_AF2.1.A_R10154.First Level-Area A Finish Plan_Record_2016 11 28 R10154 New Facility\4. T&C_RCD\PDF R10154 New Facility\4. T&C_RCD\CAD	Drawing Number AF2.1.A, titled first level – Area A Finish Plan issued for Record Drawings on 28NOV2016 from the Valley Dining Facility project, with WMU Project Number: R10154, all info contained on title block. Note identically named CAD file is also available.



WMU Design Guidelines

Examples	
Document Type/File Name / Hypothetical Folder Designation	Document Description or Notes
Operation Maintenance Manual – Submittal 138_261300.704_R8953.Medium Voltage Switchgear OIM_Approved_2012 10 17 R8953 - New Sangren Hall \4. T&C\OM	Submittal No: 704 with 261300-Med. Voltage Switchgear portion of description highlighted. Stamped approved as noted by CM on 10/15/12, MEP Review stamped checked by A/E on 10/17/12 followed by cover sheet with Vendor letter head, project name, spec section, titled O/M Data for Medium Voltage Switchgear and Sub contractor contact info, followed by O/M data. WMU project # should be included on transmittal and cover sheet.
Warranty 001_071700.2_R8994.Bentonite Waterproofing Warranty_5 yr_2015 10 16 R8994-East Hall Renovation\4. T&C\WNTY	5 year warranty for Bentonite Waterproofing with warranty start date: 10/16/2015 on certificate. Spec Section No. 071700, Submittal No. 2 sent: 2/12/2016 and stamped reviewed 2/12/2016.
Product Data – Submittal 062_09.2A_P160069.Rm 1069 Flooring Submittal_Approved_2017 05 15 P160069 Read Fieldhouse BB Locker Room\4. T&C\SUBM	Submittal number: #09-2A Flooring Submittal for room 1069 for the Read Locker Room Remodel with transmittal letter stamped reviewed by A/E firm on 05/15/17 indicating item: flooring and Spec. Division: 09. WMU project # should be included on transmittal.
*Product Data – In House Design 010_Finishes_P180009.Rms C-210W L-210 2-220W Carpet Product Data__2016 P180009 WAL Second Floor Lobby Remodel\4. T&C\SUBM	Product data for new carpet in rooms C-210W, L-210, 2-220W, with time stamped 1/28/2016. Room numbers exactly match TMA and Simple Floor Plans. Although this did not go through a formal approval process like the previous example with similar content, file as a submittal not a SPEC.
Specification - Record 174_R10154.Volume 1 Spec_Record_2016 11 28 R10154 New Facility\4. T&C_RCD\SPEC	Volume 1 of the specification for Valley Dining center issued for Record on November 28, 2016 by A/E firm. Although WMU project number is not on cover sheet as currently required it is in the header of all following sheets.
*As Built – WMU Project Manager provided 214_SK-2_P180112.Weather Station Concrete Support Base_As Built_2018 12 07 P180112 FH Weather Station\4. T&C\ASB	WMU Drawing for Weather Station Relocation, Concrete Support Base Sheet SK-2 Drawn By: d.ll. Dated 8 27 2018. Red line mark-ups clearly indicating changes to the details dated 2/15/19.
*Schematic Design Plans – zipped folder of preliminary plans not named per convention 155_DSGN_P170163.Schematic Design Plans__2018 P170163 – Arcadia Flats\2. DSGN\PLANS	Zipped folder of various schematic design files including preliminary renderings, floor plans, unit plans, site plan, tree removal survey, etc. including the final schematic design deliverables received in 2018
*Photos – zipped folder of photos not named per convention 174_T&C_R10154.Exterior Photos__2016 11 28 R10154 New Facility\4. T&C\Photos	Zipped folder of photos not named to convention of the exterior of the Valley Dining Center taken after substantial completion on July 15th 2015.

**Examples apply to WMU FM staff only*