General Process for Electronic Records:

* All electronic documents are to be housed in FireNet as the primary filing location.
* All open documents commercial agreements and property transfer forms are to be filed into the open/working files until returned or final payment.

Working Documents

**Electronic Filing System Setup: (FireNet)** Buying Team Channel

01\_Buying\_Team\_Spreadsheets\_WorkingDoc

02\_Commercial\_Agreements\_Open

03\_ Property\_Transfer\_Forms\_Open

04\_ Final\_BuyingTeam\_eDoc\_Box (see Below for structure)

Final Documents

**Electronic Filing System Setup Final Documents: (FireNet)** Buying Team Channel > 04\_Final\_BuyingTeam\_eDoc\_Box (from above)

01\_Buying\_Team\_Documentation

01\_DelegationOfAuthority 02\_TimeSheets 03\_Warrants\_BuyingTeam

02\_Buying\_Team\_Spreadsheets 03\_Commercial\_Agreements 04\_Emergency\_Equipment\_Rental\_Agreements 05\_Land\_Use\_Agreements 06\_Property\_Transfer\_Forms

07\_Receipts 08\_Transition\_Documents

See Exhibit 01 for naming conventions for each of the above folders.

*Note: All dates are in format YYMMDD i.e. 250510 No special Characters*

*All scanning should be done upright and same direction for ease of review.*

**Exhibit 01**

|  |  |  |  |
| --- | --- | --- | --- |
| **Document Type** |  | **Naming Convention** | **Example** |
| **Incident Folder** |  | Name\_Number\_JobCode | MuseumFire\_CA-SHF-00144\_P5D6EK |
| **Sub folders under each incident** | **Sub sub-folders under each** | **Naming Convention** | **Example** |
| **01\_BuyingTeamDocuments** | 01\_DelegationOfAuthority 02\_TimeSheets 03\_Warrants\_BuyingTeam | DelegationOfAuthority\_YYMMDD\_BT Leader Name  288F\_BT Members First/Last Name  If applicable: CTR\_BT First/Last Name YYMMDD-MMDD  Warrant\_FirstLastName | DOA\_230519\_JaneSmith  288F\_JaneSmith  CTR\_JaneSmith\_250510-0512  Warrant\_JaneSmith |
| **02\_BuyingTeamSpreadsheet** |  | BT Spreadsheet\_FireName\_YYMMDD  Corrected BT Spreadsheet\_FireName\_YYMMDD\_V1 | BTSS\_WoodburyFire\_250519  BTSS\_WoodburyFire\_250519\_V1 |
| **03\_CommercialAgreements** | Vendor Folders | VendorName\_RO#  COM\_VendorName\_ RO#\_Description  COM with Modification: MOD then number.  Invoice\_VendorName\_Payment Date\_RO#\_Amount | UnitedRentals\_S35  COM\_UnitedRentals\_S94\_LightTowers  COM\_UnitedRentals\_S94\_LightTowers\_Mod01  Invoice\_UnitedRentals\_250510\_S35\_547.64 |
| **04\_EmergencyEquipmentRen talAgreements** |  | EERA\_VendorName\_Agreement#\_RO#  EERA with Modification: MOD then number. | EERA\_MountainSky\_1283Z225K5016  EERA\_MountainSky\_1283Z225K5016\_Mod01 |
| **05\_LandUseAgreements** |  | LUA\_VendorName\_Agreement#\_RO#  LUA with Modification: MOD then number. | LUA\_CityofRedmond\_1283Z225K4015\_S1  LUA\_CityofRedmond\_1283Z225K4015\_S1\_Mod01 |
| **06\_PendingDocuments** | Once paid moved to Commercial Agreements | VendorName\_Resource Order Number(s)\_Description | UnitedRentals\_S35\_LightTowers  CityOfOakland\_S94\_GreyWaterDisposal |
| **07\_PropertyTransferForms** |  | PropertyFormNumber\_RO#\_Item  Forest Service  Department of Interior / Park Service | AD107\_ S234\_4TBHardrive  DI105\_ S234\_4TBHardrive |

|  |  |  |  |
| --- | --- | --- | --- |
| **Sub folders under each incident** | **Sub sub-folders under each** | **Naming Convention** | **Example** |
| **08.Receipts**  (Final and paid documents) | **Vendor Folders** | Spell out full vendor name  **Receipt Packages:**  Vendor Name\_PurchaseDate\_ResourceOrder Number(s)\_DollarAmount  **Package Order: (top down)**   1. Completed waybill 2. Receipt/invoice 3. Any other supporting documentation (i.e. emails, commercial agreement, credit card purchase order form per agency etc.) 4. Resource Order | **Example:**  Home Depot (NOT *The* Home Depot)  Walmart  NapaAutoParts (NOT Napa)  **CHARGES:**  **Single S#**  HomeDepot\_250510\_S24\_201.44  CityOfHelena\_250511\_S558\_81.69  Walmart\_250510\_S71\_65.99  **Multiple and Consecutive S#**  *(Example: Purchased S-289, S-290, S-291, and*  *S-292 from same vendor.)*  Walmart\_250510\_S289\_S292\_75.93  **Multiple Consecutive and Non-Consecutive S#**  **(List Out Individually)**  *(Example: Purchased S-289, S-292, S-293, S-294,*  *S-298 from same vendor.)*  Walmart\_250512\_S289\_292\_293\_294\_298\_61.83    **CREDITS:**  HomeDepot\_250513\_S24\_201.93\_Credit |
| **09.TransitionDocuments** |  | TransitionDoc\_Buying Team Name\_Date | TransitionDoc\_SouthwestBT\_250520 |