

# **BUYING TEAM ELECTRONIC DOCUMENTS**

## Standard Operating Procedures

**Electronic Filing System Setup: (Firenet)** Buying Team Channel for working files

- 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\_Pending\_Documents
- 07\_Property\_Transfer\_Forms
- 08\_Receipts
- 09\_Transition\_Documents

**Electronic Filing System Setup:** General > eDOC Box01\_Buying Team

- 01\_Buying\_Team\_Documentation
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- 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. 230510*

*No special Characters*

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

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**Table 1.**

Document Type		Naming Convention	Example
<b>Incident Folder</b>		Name_Number_JobCode	Museum Fire_CA-SHF-00144_P5D6EK
<b>Sub folders under each incident</b>	<b>Sub sub-folders under each incident</b>	<b>Naming Convention</b>	<b>Example</b>
<b>01_BuyingTeamDocuments</b>	01_DelegationOfAuthority	DelegationOfAuthority_YYMMDD_BT Leader Name	DOA_230519_JaneSmith
	02_TimeSheets	288F_BT Members First/Last Name	288F_JaneSmith
	03_Warrants_BuyingTeam	If applicable: CTR_BT First/Last Name YYMMDD-MMDD	CTR_JaneSmith_230510-0512
		Warrant_FirstLastName	Warrant_JaneSmith
<b>02_BuyingTeamSpreadsheet</b>		BT Spreadsheet_FireName_YearMonthDay	BTSS_WoodburyFire_230519
<b>03_CommercialAgreements</b>	Vendor Folders	VendorName_Resource Order Number	UnitedRentals_S35
		AgreementTupe_Vendor Name_Resource Order Number(s)_Description	COM_UnitedRentals_S35_LightTowers_Mod01 COM_CityOfOakland_S94_GreyWaterDisposal
		Invoice_VendorName_Payment Date_Resource Order Amount	Invoice_UnitedRentals_230510_S35_547.64
<b>04_EmergencyEquipmentRentalAgreements</b>		Agreement_Vendor Name_Agreement Number Modifications notes with MOD then number.	EERA_MountainSky_1283Z220K5016 EERA_MountainSky_1283Z220K5016_Mod01
<b>05_LandUseAgreements</b>		Agreement Type_Vendor Name_Agreement Number_RO# Modifications notes with MOD then number.	LUA_CityofRedmond_1283Z220K4015_S1 LUA_CityofRedmond_1283Z220K4015_Mod01_S1
<b>06_PendingDocuments</b>	Once paid moved to Commercial Agreements	Vendor Name_Resource Order Number(s)_Description	UnitedRentals_S35_LightTowers CityOfOakland_S94_GreyWaterDisposal
<b>07_PropertyTransferForms</b>		Property Form Number_resource order number _Type of Item	107_S234_4TBHardrive

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Sub folders under each incident	Sub sub-folders under each	Naming Convention	Example
<b>08.Receipts</b> (Final and paid documents)	<b>Vendor Folders</b>	Spell out full vendor name  <b>Receipt Packages:</b> Receipt_Vendor Name_Date of purchase_Resource Order Number(s)_Dollar amount  <b>Package Order: (top down)</b> 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	<b>Example:</b> Walmart NapaAutoParts (NOT Napa)  <b>CHARGES:</b> <b>Single S#</b> Receipt_HomeDepot_230510_S24_201.44 CityOfHelena_230511_S558_81.69 Walmart_230510_S71_65.99 Walmart_230510_S104_97.62 <b>Multiple S#</b> Walmart_230510_S289_S312_75.93 Walmart_230512_S384_385_389_391_61.83  <b>CREDITS:</b> HomeDepot_230513_S24_201.93_Credit
<b>09.TransitionDocuments</b>		TransitionDoc_Buying Team Name_Date	TransitionDoc_SouthwestBT_230520