

RM Data Entry Principles

Basic Principles

The information should go from the specific to the general. Describe the document-specific details first (document type such as “Contract” or “Request for Proposal”) and the subject matter after. (Project Name, usually).

- Example: Amendment – Eden II School for Autistic Children. The user doing the search will call up all the documents related to a project (in this case, the Eden II School). When reading the search results, the details (what differentiates this hit from all the other hits related to the Eden II School) should come first in the screen.

Make information human readable or fully descriptive.

- **Records types** are described in the Record Series field but users don’t know those codes (ACC-02 for Pinks, CO-05 for VENDEX).
- **Dates** are also part of the End Date field but the display is confusing on the search screen.
 - Example: Help the user differentiate between two folders simply labeled “Turner Construction” by adding the record type and date information, if applicable: Turner Construction – VENDEX; Turner Construction – Apple Pinks Fiscal Year 1995.

Style Guide

- Capitalize all words except conjunctions and prepositions
- Acronyms
 - Spell out
 - Except EDC, IDA, FSC, PDC, MBA, RFP, RFEI, SEQR(A), CEQR(A), RIMS
 - No periods
 - No spaces between letters
 - Can put acronym in (PARENS)
- Spell out abbreviations
 - Except business entities and these are followed by a period (i.e., Inc., Ltd., Corp.)
 - Except St. (as in St. George)
- Spaces around /
 - For example, Lease to Reduce the Size / Adjust the Rent
- Dates
 - Spell out month (except when adding a MISSING or EMPTY date)
 - Four digits for years
 - Two digits for month and day (e.g., 01)
- Use “and” and not “&” unless it’s part of a common name
 - For example, AT&T
- Hyphens and compound words
 - Railroad, on-site, email

Folders

Multiples – If there is more than one folder in the same box with the same folder description (and no way to differentiate the two, three or more), be sure to include the numbering or ordering information. The numbering or folder order information should be included after the recurring detail part of the folder title.

- Example: Turner Construction Company (1 of 2) – EDC Pinks Fiscal Year 2003 and Turner Construction Company (2 of 2) – EDC Pinks Fiscal Year 2003

Empty folders – When entering folders in the system, you may find empty folders.

- If the folder is from an L2 box (one that has never been inventoried at the folder level), you do not need to enter the empty folder in the system. Please discard.
- If the folder is part of a new accession, please note on the folder title that the folder was empty.
Example: Turner Construction Company (EMPTY) – EDC Pinks Fiscal Year 2003.
- If the folder is part of a review/return box, please note on the folder title that the folder is empty.
Example: Turner Construction Company (EMPTY 07/15/2014) – EDC Pinks Fiscal Year 2003.

Missing folders – When reviewing a box, you find that a folder is missing, please note on the folder title that the folder is missing. Example: Turner Construction Company (MISSING 07/15/2014) – EDC Pinks Fiscal Year 2003.

Undated records – If the records in a folder do not have a date, use the date of the most recent folder in the redweld or the box and add this note to the comment field:

- Note on Folder End Date: The documents in this folder are not dated. For retention management purposes, the date of the most recent document in the box containing this folder has been used to fill the required End Date field.

Dates

Use the most recent date in the file for the end date.

- Except contracts – Use the date that the contract became active, i.e. the execution date.

If there is a month and year but no day given, use the last day of the month.