RM Data Entry Patterns

Patterns by Department

Accounting
Asset Management
Budget
Capital Programs
Compliance
Contracts
Finance
Human Resources
Internal Audit
Legal
Planning
President’s Office
Real Estate Development
Real Estate Transaction
Services (RETS)
Research & Analysis
Transportation
Marketing

Accounting
For ACC-01 Closed Contracts:
1. Department: ACCT or Accounting
2. Project: 10 or General
3. Box Title: [Agency or Fund/Division] Closed Contracts
4. Folder Title: [Old PDC Contract #] [Vendor Name, full name, see how it appears on the contract] – [Scope of Contract/Project] Contract Payment Ledger
5. Folder Comment: [Box Title] and alternate contract number (Ledger and Contract may have different Contract Numbers if contract occurred during PDC-to-EDC switchover)
6. End Date: last date on the contract payment ledger (often labeled ‘contract close-out date’)
7. Record Series: ACC-01
8. Example Box: 8994

For ACC-01 Billings:
1. Department: ACCT or Accounting
2. Project: 10 or General
3. Box Title: [Agency or Fund/Division] Billings
4. Folder Title: [Agency or Fund/Division] Billings – [Month] [Year – four digits]. You can abbreviate the name of the agency (EDC, FSC, IDA, Apple, TCR) in the Folder Title field and then spell out the full name in the Folder Comment field.
5. Folder Comment: alternate name for division/fund or the full name of the Agency or alternate name of the fund.
6. End Date: last date on the contract payment ledger (often labeled ‘contract close-out date’)
7. Record Series: ACC-01
8. Example Box:

For ACC-02 Accounts Payable / Pinks:
1. Department: ACCT or Accounting (although for some years, FIN or Finance)
2. Project: 10 or General (or for Finance, 24 or General)
3. Box Title: [Agency or Fund/Division] [Vendor name if there is only one vendor] Pinks FY [4-digit Year] You can abbreviate the name of the agency (EDC, FSC, IDA, Apple, TCR).
4. Folder Title: [Vendor Name, full name, see how it appears on the check] – [Fund or Division for EDC, EDC if no Fund or Division lists, or other agency names for non-EDC pinks] Pinks Fiscal Year [####]
5. Folder Comment: alternate name for the vendor, alternate name for division/fund or record type
6. End Date: last date of the Fiscal Year, 6/30/####
7. Record Series: ACC-02
For ACC-03 Accounts Receivable / Cash Receipts:
1. Department: ACCT or Accounting (although for some years, FIN or Finance)
2. Project: 10 or General (or for Finance, 24 or General)
3. Box Title: [Agency or Fund/Division] Cash Receipts. You can abbreviate the name of the agency (EDC, FSC, IDA, Apple, TCR).
4. Folder Title: [Agency or Fund/Division] Cash Receipts – [Month] [Year – four digits]. You can abbreviate the name of the agency (EDC, FSC, IDA, Apple, TCR) in the Folder Title field and then spell out the full name in the Folder Comment field.
   a. If the cash receipts cover more than one month’s worth, express the range by entering [Month] [Year – four digits] to [Month] [Year – four digits] (for example, August 2010 to September 2010).
5. Folder Comment: alternate name for division/fund or the full name of the Agency or alternate name of the fund.
6. End Date: last date of the month
7. Record Series: ACC-03

For ACC-04 for TCR or Other Bank Statements:
1. Department: ACCT or Accounting (although for some years, FIN or Finance)
2. Project: 10 or General (or for Finance, 24 or General)
3. Box Title: TCR Bank Statements [Year]
4. Folder Title: [Full Museum Name (acronym)] - [Full Name of Bank] [Account Type (if provided, abbreviations are acceptable*)] – Bank Statement [Year]
5. End Date: use the date of the most recent document in the file
6. Record Series: ACC-04 or ACC-10

* Account names included abbreviated terms. Do not use A/C for Account of PYMT for Payment or INT for Interest. If you are unsure about the acronym, check on ARM. If you cannot find the full name, leave the abbreviation in place.

For ACC-07 for Financial Statements (from external sources)
1. Department: ACCT or Accounting
2. Project: 10 or General
3. Folder Title: [Full Name of Entity] [(Entity Abbreviation, if appropriate)] Financial Statements – [Time Period Covered by Report]
4. End Date: Date of the Report, Usually found in letter from auditing firm at beginning of report
5. Record Series: ACC-07 (for one copy), all additional copies can be GE-05

Asset Management
AM Drawing Project
1. Department: AM or Asset Management (Active)
2. Box Name: BAT Archive Drawings
3. Box Description: AEC Box ### (box number field from spreadsheet)
4. Project: Project Central Number, if available; otherwise, 100 GENERAL (Project Number can be found in the EDC Contract Code field in the spreadsheet)
5. Folder Type: Use BOX if all of the drawings belong to the same set. If multiple drawing sets, use FLDR for each set.
6. Folder Title: use a combination of up to 5 fields from the spreadsheet:
   • Facility Name AKA As appears on the spreadsheet. If there is no Facility Name AKA, use the Facility Name field.
   • Component Site If available
• **Document Type 1** As appears on the spreadsheet (As Built, Drawings and Specifications, etc.), but not the condition comments (ie, Fragile)

• **Set Identifier**

**Formula:** Facility Name AKA Component Site Document Type 1 Set Identifier

**Example:** BAT Building B As Built 02-10-01

7.Folder Comment: use a combination of up to 3 fields from the spreadsheet:

  • **Facility Name** As appears on the spreadsheet
  • **Contract Name** May include the Facility Name so these may have some overlap
  • **Contract Number** EDC numbers usually made of a 3 or 4-digit project number by a 4-digit contract number

**Formula:** Facility Name Contract Name Contract Number

**Example:** Brooklyn Army Terminal 3rd Floor Renovation Contract 52810004

8. **End Date:** Most recent date for set from Date Created field in the spreadsheet

9. **Record Series:** AM-02

**Approval Letters (AL)**

1. Department: AM or Asset Management

2. Project: Use Project Central Number for Retainer Contracts (i.e. 1685) or GENERAL (100) for others

3. Box Name: [Contractor] Approval Letters

4. Folder Title: Approval Letter (AL) ##### [Building/Property] [Scope of Work] – [Subcontractor Name]

5. Folder Comment: [General Contractor/Construction Manager Name] [Contract #####]

6. End Date: Date of Document (the date the letter was sent to EDC)

7. **Record Series:** Can be AM-03, AM-04, or AM-05

**Budget**

**For Bu-01 Registration Due Diligence:**

1. Department: BDGT or Budget

2. Project: Use Project Central Number

3. Folder Title: [Vendor Name] – Registration Due Diligence [Project Name] Contract [Contract #]

4. **End Date:** Use the Approved by Controller date at the bottom of the Registration sheet or the date of the most recent document in the file.

5. **Event Date:** Check contract status in Project Central. If contract is closed, use date closed as provided.

6. **Record Series:** BU-01

**For BU-01 Certificate to Proceed:**

1. Department: BDGT or Budget

2. Project: General

3. Folder Title: [Project Name] – Certificate to Proceed (CP) File

4. Folder Comment: Project number

5. **End Date:** Use the date of the most recent document in the file.

6. **Record Series:** BU-01

**Capital Programs**

**For CP-02 Requisitions**

1. Department: CAP or Capital Programs
2. Project: Use project number from contract
3. Box Title: [Contractor] Requisitions
4. Folder Title: Requisition [Number] [Contractor] – [Project Name] Contract [Number]
5. Folder Comment: Invoices
6. End Date: Use the date of the most recent document in the file
7. Event Date: Research contract status in Project Central. If project has closed, use the date provided. If there is no End Date on the contract, look for the most recent date on the page (look for the Registration List for the most recent date "Approved by Controller").
8. Record Series: CP-02

Example Box: 25774

For CP-02 Change Orders
1. Department: CAP or Capital Programs
2. Project: Use project number from contract
3. Folder Title: Change Order [Number] - [Contractor] – [Project Name] Contract [Number]
4. Folder Comment: Any additional names for the contractor or subcontractor
5. End Date: Date of Document (the date the letter was sent to EDC)
6. Event Date: Research contract status in Project Central. If project has closed, use the date provided. If there is no End Date on the contract, look for the most recent date on the page (look for the Registration List for the most recent date “Approved by Controller”).
7. Record Series: CP-02

Example Box: 14107

For CP-02 Change Proposals
1. Department: CAP or Capital Programs
2. Project: Use project number from contract
4. Folder Comment: Any additional names for the contractor or subcontractor
5. End Date: Date of Document (the date the letter was sent to EDC)
6. Event Date: Research contract status in Project Central. If project has closed, use the date provided. If there is no End Date on the contract, look for the most recent date on the page (look for the Registration List for the most recent date “Approved by Controller”).
7. Record Series: CP-02

Example Box: 14107

For CP-02 RFIs
1. Department: CAP or Capital Programs
2. Project: Use project number from contract
3. Folder Title: RFI [Number] [Brief Description], [Subcontractor] - [Contractor] - [Project Name] Contract [Number]
4. Folder Comment: Spell out RFI: Request for Information
5. End Date: Date of Document (the date the letter was sent to EDC)
6. Event Date: Research contract status in Project Central. If project has closed, use the date provided. If there is no End Date on the contract, look for the most recent date on the page (look for the Registration List for the most recent date “Approved by Controller”).
7. Record Series: CP-02
Compliance
For CM-04 and CM-05 Bond Books
1. Department: COMP or Compliance
2. Project: 86 or General for older transactions. If there is a Project Central project number, use that.
3. Folder Title: [Year Project Closed] [Name of Project] [Document Type] (PATS 1234)
4. Folder Comment: Full Project metadata: Project Name AKA Project AKA [Primary Holding Company] <Program Type, Program Description> Agreement Type (PATS 1234) Law Firm
   a. For example: SFX Entertainment, Inc. AKA Clear Channel Entertainment / Live Nation <Straight Lease, Commercial Incentive> Termination (PATS 1936) Hawkins Delafield and Wood, LLP
5. End Date: Delivered date
6. Folder Event Date: Retirement date of the project as appears on DASH
7. Record Series: CM-04 for originals; CM-05 for copies

For CM-01 “Red” Files, Self-Audits, project compliance documents (tax exemption letters, employment reports or schedules, insurance forms, etc.). For other project related documents, such as the pre-termination documents, use the record series LE-02
1. Department: COMP or Compliance
2. Project: 86 or General for older transactions. If there is a Project Central project number, use that.
3. Folder Title: [Document Type]- [Name of Project] (PATS 1234)
4. End Date: Delivered date
5. Folder Event Date: Retirement date of the project as appears on DASH
6. Record Series: CM-01

For CM-06 Project registries and reports for Compliance Department use
1. Department: COMP or Compliance
2. Project: 86 or General for older transactions. If there is a Project Central project number, use that.
3. Folder Title: [Title of Report/Registry], [Date Range] - [Name of Project] (PATS 1234)
4. End Date: Final day of the final month in the date range covered by the report
5. Folder Event Date: Retirement date of the project as appears on DASH
6. Record Series: CM-06

Contracts
For CO-01 Contracts Records:
1. Department: Contracts (CNTR)
2. Project: Use Project Central Contract Number
3. Redweld Title: [Full Vendor Name] – [Project Name] Contract [Contract #]
4. Folder Title: [Type of Document] – [Project Name] Contract [Contract #]
5. Folder Comment: Contract Description from Project Central (on Redweld only), alternate names for the vendor, if any
6. Folder Date: For the folder with the contract itself, use the date that the contract was executed.
7. Folder Event Date: Check contract status in Project Central. If contract is closed, use the Project Central contract close date, in parenthesis next to the (Closed) in project status line
   a. If there is no date in the status line, use the most recent of:
      i. End of contract on Project Central
      ii. Contract Registrations approval
iii. Contract database, look for the GP Payment tab and look for the most recent Payment Date (sort that column)

iv. Accounting records in ARM (payment ledgers or closed contract files)

v. Payments folder end date in Contract folder (last pink date)

vi. Check on ARM for other related materials already destroyed

8. Record Series: CO-01

Or for Legacy CO-01 Contracts Records:

1. Department: Contracts (CNTR)

2. Project: Use Project Central Contract Number

3. Folder Title: Type of Document – Project Name Contract [Contract #]
   a. If the project number is 100 Un-Classified, use the contract description (Description field in the Contract page) instead of the Project Name in the Folder Title.

4. Folder Comment: Full Vendor Name, Contract Description

5. Folder Event Date: Check contract status in Project Central. If contract is closed, use date closed as provided. If there is no End Date on the contract, look for the most recent date on the page (look for the Registration List for the most recent date “Approved by Controller”).

6. Record Series: CO-01

For CO-02 or CO-03 RFP Responses:

1. Department: Contracts (CNTR)

2. Project: Use Project Central Number

3. Folder/Redweld Title: [Full Vendor Name] – [Response Type*] Response [Project Name] Contract [Contract Number]
   • Example Response Types: RFP, IFB, RFEI – given in Procurement section of Project Central (abbreviations ok)

4. Folder Comment: [Procurement Title] (can be found in Procurement section of Project Central)

5. End Date: Response due date (available in Procurement section of Project Central)

6. Folder Event Date: CO-02: Research contract status in Project Central. If project has closed, use the date provided. CO-03: For land sale proposals, use date of closing date (as found in COMP database or ARM). CO-07: n/a

7. Record Series: CO-02 for all proposals/responses except those related to land sale projects, which are CO-03. CO-07 for RFEI Responses

8. Example box: 802382617

For CO-02 / CO-03 / CO-07 Contract Procurement:

1. Department: Contracts (CNTR)

2. Project: Use Project Central Number

3. Redweld Title: Procurement File – [Project Name] Contract [Contract Number]*
   • * = if available

4. Folder Title: [Type of Document] - [Project Name] Contract [Contract Number]*

5. Folder Comment: [Procurement Title] (can be found in Procurement section of Project Central)

6. End Date: use the date of the most recent document in the file

7. Folder Event Date: CO-02 (non-land sale): Research contract status in Project Central. If project has closed, use the date provided. CO-03 (land sale): look for closing file on ARM to determine closing date. CO-07: n/a

8. Record Series: CO-02 (non-land sales) or CO-03 (land sales) or CO-07 (RFEIs)

9. Example box: 802382953

For CO-05 Vendex Records:

1. Department: Contracts (CNTR)

2. Project: 22 or General

3. Box Title: Vendex

4. Folder Title: [Full Vendor Name] – Vendex

5. Folder Comment: any alternate names for the vendor, if any

6. End Date: use the date on the latest Vendex Clearance Memo (usually the first item in the folder). If there is no clearance or partial clearance memo, look for the most recent date in the folder.
7. Record Series: CO-05

For GE-09 The City Record:
1. Department: CNTR or Contracts
2. Project: 22 or General
3. Box Title: The City Record
4. Folder Type: Box
5. Folder Title: The City Record – Month Year to Month Year
6. End Date: Date of most recent newspaper
7. Record Series: GE-09

For GE-02 Selection Committee Memos
1. Dept: CNTR or Contracts
2. Project: 22 (General)
3. Redweld Title: [Month Year] – Selection Committee Items
4. Folder Title: [Project Under Discussion] – Selection Committee Items
5. Record Series: GE-02

Finance
For ACC-02 WTC Grant Payments
1. Department: FIN or Finance
2. Project: 58 or WTC Grant Application Payments
3. Box Title: WTC Disaster Grants
4. Folder Title: [Vendor Name, full name, see how it appears on the check] – World Trade Center Grant Application and Payment
5. Folder Comment: Lower Manhattan Business Retention Grant [alternate name for the vendor]
6. End Date: use the date of the most recent document in the file
7. Record Series: ACC-02

Human Resources
For HR-09 Time Sheets:
1. Department: HRES or Human Resources
2. Project: 26 or General
3. Folder Title: [Employee’s Name] - [Other agency names for non-EDC] Timesheets / Time Cards – [Date (with the month spelled out, and four-digit year]
   OR
   [Other agency names for non-EDC] Timesheets / Time Cards - [Date Range (again, month spelled out and four-digit year]
   OR
   [Other agency names for non-EDC] Timesheets / Time Cards – [Letter Range] - [Date (with the month spelled out, and four-digit year]
4. Folder Comment: Time Sheets
5. End Date: use the date of the most recent document in the file
6. Record Series: HR-09

For HR-03 Personnel Files:
1. Department: HRES or Human Resources
For HR-01 Resumes
1. Department: HRES or Human Resources
2. Project: 26 or General
3. Folder Title: [Letter] - [Other agency names for non-EDC] Resumes (and/or Job Applications) (and/or Rejection Letters) [Year to Year]
   Or [Position] - [Other agency names for non-EDC] Resumes (and/or Job Applications) (and/or Rejection Letters) [Year to Year]
4. End Date: use the date of the most recent document in the file
   a. Add note in folder comment
5. Folder Event Date: If available, the hire letter with start date, otherwise the last day of the year
6. Record Series: HR-01

**Internal Audit**

For IA-03 Final Audit Reports (E-Docs):
1. Department: IA or Internal Audit
2. Project: 29 or General
3. Redweld Title: Final Audit Reports Fiscal Year [Fiscal Year Covered by Reports]
4. Redweld & Folder Status: Virtual
5. Folder Title: Project Name – Final Audit Report Fiscal Year Fiscal Year
6. Folder Comment: Date Range Covered by Report (i.e. July 1, 2013 to December 31, 2013)
7. End Date: Date of Report
8. Record Series: IA-03

For IA-01 Audit Workpapers:
1. Department: IA or Internal Audit
2. Project: 29 or General
3. Box Name: Audit Workpapers
4. Folder Title: Project Name/Subject of Audit Including Contract Number if Applicable – Audit Workpapers
5. End Date: Date of Most Recent Document in the Folder/Box*
6. Record Series: IA-01

*Note: Loose files/binders may be entered at Box Level if all files are related to the same audit

**Legal**

For LE-18 FOIL Requests:
1. Department: LGL or Legal
2. Project: 30 or General
3. Folder Title: [Requestor’s Name] - [Requestor Company/Organization] - FOIL Request
4. End Date: use the date of the initial request
5. Folder Event Date: use the date of last EDC response or date stamped on folder (close-out date)
6. Record Series: LE-18

For LE-15 Litigation Records:
1. Department: LGL or Legal
2. Project: Project Central number provided
3. Folder Title: [Claimant’s Name] v. [EDC/IDA/or other City Agency involved in litigation] – [Type of Claim (if provided)] Litigation File
4. End Date: use the date of the most recent document in the file
5. Folder Event Date: Settlement/Dismissal Date, or Claim Resolution Date (if available)
6. Record Series: LE-15

For LE-06 Board books /meeting packets:
1. Department: LGL or Legal (but packets can be found in all departments)
2. Project: 30 or General (if from another department, use that department’s general)
3. Folder Title: [Agency, EDC or Apple or CRC, abbreviations are okay] [Meeting Group, Board of Directors, Executive Committee, Real Estate Committee, etc.] Meeting Packet – Date of Meeting (with the month spelled out, and four-digit year)
4. Folder Comment: spell out the agency name: Financial Services Corporation (FSC)
5. End Date: use the date in the cover letter, or if not available, the date of the meeting
6. Record Series: LE-06

For LE-03 Real Estate Closing Files:
1. Department: LGL or Legal
2. Project: Project Central number provided
3. Folder Title:
   a. For Redwelds: [Project Name] [Transaction Type] Closing File (# of #)
   Ex: Kristal Cadillac Land Sale Closing File (1 of 2)
   b. For Folders within the Redweld: [Document Type] – [Project Name]
   Ex: Agreement – Contract of Sale – Kristal Cadillac
4. Folder Comments (for all Redwelds): enter Transaction Description formula:
   a. [Project Name] [Transaction Type] (BBL, Street Address) <Grantor, Grantee>
      i. 1-digit Borough; 5-digit Block; up to 4-digit Lot. If more than one BBL, list each separately (use preceding zeros, where applicable). The upper case letter ‘P’ signifies a Partial Lot (where applicable).
      ii. Borough numbers: 1 Manhattan, 2 Bronx, 3 Brooklyn, 4 Queens, 5 Staten Island
   Ex: Kristal Cadillac Land Sale (3-08591-0150) <City of New York, Bical Development, Inc.>
5. End Date: use the closing date
6. Record Series: One of two choices:
   a. LE-03 Real Estate closing files – completed transactions: most complete record of closing transactions.
   b. LE-04 Real Estate closing files – incomplete transactions: Records relate to transactions that are withdrawn or otherwise terminated prior to closing.

For LE-02 Sublease Files:
1. Department: LGL or Legal
2. Project: Project Central number provided
3. Folder Title:
   a. For Redwelds: Sublease Consent, [Subleaser] - [Project Name] (PATS #) (# of #)
For LE-02 Bond Closing Files:
1. Department: LGL or Legal
2. Project: Project Central number provided
3. Folder Title:
   a. For Redwelds: [Closing Year] [Project Name] Closing File (PATS #) (# of #)
      Ex: 1999 Dioni Closing File (PATS 1763) (2 of 2)
   b. For Folders within the Redweld: [Document Type] – [Project Name]
      Ex: Executive Summary - Dioni
4. Folder Comments (for all Redwelds): enter Transaction Description formula:
   a. Full Project metadata: Project Name AKA Project AKA [Primary Holding Company] <Program Type, Program Description> Agreement Type (PATS 1234)
      Ex: Dioni AKA 49-29 30th Place Realty, LLC [49-29 30th Place Realty, LLC] <Manufacturing Facilities Bond, Bond Transaction> (PATS 1763)
   b. End Date: use the closing date (or most recent date in folder?)
5. Record Series: LE-02

Planning
For PL-04 Environmental Reviews for IDA Projects
1. Box Name: IDA Environmental Reviews
2. Department: PLAN or Planning
3. Project: Use Project Central Number
4. Folder Title: SEQR or CEQR Environmental Review ##-### – Project Name (PATS Number)
5. End Date: Most Recent Date in Folder
6. Folder Event Date: Retirement date of the project as appears on DASH
7. Record Series: PL-04

For PL-04 Environmental Reviews for Other Projects (Hardy Adasko Room)
1. Department: PLAN or Planning
2. Project: General (38)
3. Folder Title: Environmental Assessment Statement (EAS) Month Year – Project Name and Location including BBL, Street Address, etc.
4. Folder Comment: Prepared by Name of Firm
5. End Date: Evaluation Date
6. Record Series: PL-04

For PL-01 Phase I / Phase II Environmental Site Assessments or Reviews
1. Box Name: Phase I Assessments
2. Department: PLAN or Planning
3. Project: 38 or GENERAL
4. Folder Title: [Document Type], [Month Year] – Project Name and Location including BBL, Street Address, etc.
5. Folder Comments: Variations/Abbreviations of Project Location. Author of Report
6. End Date: Date of Report
7. Record Series: PL-01

President’s Office
For GE-01 President’s correspondence, sometimes called Chron Files or Chronological Files. These include the outgoing correspondence of the president, copies of the letters sent by the office, and are usually organized by month and year.
1. Department: PRSD or President’s Office
2. Project: 50 or General
3. Folder Title: President’s Name Files - Month Year
4. End Date: use the last day of the month, if organized by month; otherwise, use the date of the most recent record in the file
5. Record Series: GE-01

For GE-02 President’s incoming correspondence or project files. These include incoming correspondence, internal memos, project reports and updates, department summaries, etc. and are usually organized by subject headings by year: East River Landing, EDC Budget, Flushing Municipal Parking Lot, etc.
1. Department: PRSD or President’s Office
2. Project: 50 or General
3. Folder Title: Project Name or Subject Area (acronym) – President’s Name File Year
4. End Date: use the date of the most recent document in the file
5. Record Series: GE-02

Real Estate Development
For RE-02 Terminated Projects:
1. Department: RED or Real Estate Development
2. Project: 40 or General
3. Folder Title: Vendor or Interested Party - Borough, if available Terminated Projects / Inquiries
4. End Date: use the date of the most recent document in the file
5. Record Series: RE-02

For RE-04 IPIP Records:
Use the pattern for CO-01 Contracts Records

For RE-05 Appraisals:
1. Department: RED or Real Estate Development
2. Project: 40 or General
3. Folder Title: Appraisal - Borough, Block and Lot (#-####-##) Project Name/Vendor/Interested Party (Street Address) – Appraiser, Valuation Date (Month Year)
4. End Date: use the date of the most recent document in the file
5. Record Series: RE-05

Real Estate Transaction Services (RETS)
For FI-01 Closed Projects, Bond or Straight-Lease Transaction Files
1. Department: RETS or Real Estate Transaction Services
2. Project: Use Project Central Number
3. Redweld Title: Project Name – Application File (PATS 1234)
4. Folder Title: Document Type (from label on folder, without number) – Project Name
5. End Date: use the date of the closing
6. Folder Event Date: if the transaction is inactive, enter the Retirement Date from DASH
7. Record Series: FI-01
8. Example Box: 382989

For SR-03 For Incomplete Bond or Straight Lease Transaction Files
1. Department: RETS or Real Estate Transaction Services
2. Project: Use Project Central Number
3. Redweld Title: Project Name – Inducement File
4. Folder Title: Document Type (from label on folder, without number) – Project Name
5. End Date: use the date of the most recent document in the file
6. Record Series: SR-03
7. Example Box: 382989

For RE-02 Incomplete Land Sale Transaction Files
1. Department: RETS or Real Estate Transaction Services
2. Project: Use Project Central Number
3. Redweld Title: Project Name – Terminated Project
4. Folder Title: Document Type (from label on folder, without number) – Project Name
5. End Date: use the date of the most recent document in the file
6. Record Series: RE-02

Research & Analysis
For RA-04 Research Requests for active IDA Projects
1. Box Name: RIMS
2. Box Description: Regional Input-Output Modeling System (RIMS)
3. Department: RES or Research & Analysis
4. Project: General (43)
5. Folder Title: RIMS – Project Name (PATS Number)
6. Folder Comment: Regional Input-Output Modeling System Research Files
7. End Date: Most Recent Date in Folder
8. Record Series: RA-04

Transportation
For TR-05 Toll Receipts:
1. Department: TRAN or Transportation
2. Project: 48 or General
3. Folder Title: Toll Receipts / Toll Reimbursements – [Vendor Name or Range of Vendors’ First Initials included in the box (see trucking codes)] – [Year]
4. Folder Comment: Howland Hook Container Terminal, Inc.
5. End Date: Look for the most recent date on the checks (usually a small pink slip)
6. Record Series: TR-05

Marketing
For MK-01 Marketing Files:
1. Department: MKT or Marketing
2. Project: 33 or General
3. Folder Title: [Project Title (If possible)] [Material Type (Flyers, Booklets or Brochures)] - [Other agency names for non-EDC] Title on Document (If any) and Published Date (If possible)
4. Folder Comment: Other titles or identifiers listed on the document (ex. former Box Number or former Barcode if available) or descriptive tags
5. End Date: Use the date of the most recent document in the file
6. Record Series: MK-01

“General” Files
For files that don’t fit in our current patterns, don’t have a clear project/contract, or can’t be attributed to a single owner; and are pre-2000.

1. Department:
   a. Use department (if given)
   b. if department is ZCON
      i. PDC if records are pre-1991
      ii. EDC if records are 1991 or later
2. Project: General
3. Folder Title: [Document Type (if accessible)], [Project/Property] – Pre-2000 File
4. End Date: Use the date of the most recent document in the file
5. Record Series: GE-02