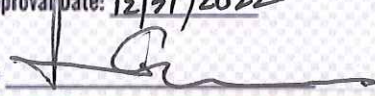




Director Approval - Original Approval Date: 12/31/2016
Update Approval Date: 12/31/2022
Signature: 

PARKS & RECREATION

Date: 12/31/2016 Updated: 12/31/2022 Date To Be Reviewed: Three Years – 12/31/2025

Created: March 17, 2016

Title of Document: 3.5.C LOPR_Shared Drive Management Procedures

Background:

The Lake Oswego Parks & Recreation Department (LOPR) shares files on a shared drive of an IT server. The current situation is that LOPR has many authors who create documents that should be easily accessible by all. The reason many documents cannot be located is because they have been placed in someone's personal desktop, drives or folders and filed under that individual's personal, non-standard filing structure.

It is important that certain folders on the shared drive contain ALL pertinent FINAL and supporting data files regardless of the author. It is important for the folder and file naming and structures to be consistent so anyone searching for a document can easily locate it. It is also necessary for there to be a folder owner who is responsible for the integrity of the shared folder. Finally, it is the responsibility of all authors to determine which files belong in the designated folders and name the files accordingly based on instructions in this document.

Please take care when working in shared folders to not delete or move folders or files accidentally.

Follow instructions in the *LOPR Exit Checklist* for P drive for disposition of folders and files belonging to exiting employees.

Procedure:

The folders on the shared drive that have been determined as needed to house all FINAL pertinent documents and supporting data are listed below along with the designated folder owners:

ACTIVE NETWORK DOCUMENTATION- Admin Assistant
CAMPS (contains all Division Camp photos) – Youth & Teen Coordinator
CATALOG - Media Specialist
CONTRACTS (at the Dept. level) – Admin Assistant, Registrar
CUSTOMER EXCELLENCE (SURVEYS_INDICATORS) – Deputy Director Recreation, Designee
DIGIPHOTO – Media Specialist and Content Providers
DONATION/MEMORIAL – Admin Assistant
EMERGENCY – Registrar Designee
FACILITIES – Registrar Designee & PARKS Admin Reservation Coordinator



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-
- FORMS – Media Specialist
 - HOW TO (Except Active How Tos) – Admin Assistant
 - INCLUSIVE RECREATION – Youth & Teen Coordinator
 - LETTERHEAD - Admin Assistant
 - LIVING WELL IN LO - Admin Assistant
 - LOGOS - Media Specialist
 - MANAGEMENT SERVICES (Do Not Delete) – Deputy Director Recreation, Designee
 - MARKETING - Deputy Directors & Special Events Supervisor
 - PARK RULES – Deputy Directors, Designee
 - PARKS BOARD - Admin Assistant
 - PARKS PLAN 2025 - Parks Planner/Project Manager
 - PARKS PLANNING Mgmt Svcs – Parks Planner/Project Manager & Recreation Superintendent
 - PARKS POLICIES & PROCEDURES – Admin Assistant
 - PURCHASE ORDER TRACKING- Admin Assistant
 - REC PRGM MGMT – Deputy Director Recreation, Designee
 - RECORDS RETENTION – Admin Assistant
 - REPORTS – Deputy Director Recreation or Designee
 - SAFETY – Registrar Designee
 - SPECIAL EVENT PERMITTING- PARKS Admin Reservation Coordinator
 - REGISTRAR – Registrar Designee
 - TOC JOB DESCRIPTIONS - Division Managers
 - VOLUNTEER PROGRAM – Admin Assistant and Division Supervisors

The guidelines for directory structures and file naming conventions are outlined below:
need to follow these guidelines:

FOLDER NAME – CONTRACTS

Sub Folders: MGMT SVCS

Sub Folders: Vendor Name (if an individual...last name, first name

Sub Folders: (if needed for repeat contracts): Year of Contract Service

Files...VendorName_Year_ContractDescription_FINAL_AllSigned Date

(i.e. APU_2022_AdminProjects_FINAL_All Signed 122522)

No need to keep iterations of agreements once you have the FINAL. You should keep the original Word doc that created the agreement in case you need to use it again. If you scan POs, these should also be in the vendor directory by year if necessary along with any other supporting documents not contained within scanned FINAL pdf version of the agreement.



Director Approval - Original Approval Date: _____
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FOLDER NAME – FORMS and HOW TO

Sub Folder Topic or Name of Form

Files...Name the document to make sense to audience_date created. Be sure to either archive (by creating an Archive folder) or delete old, outdated forms or instructions

Best Practices Tips for Using Shared Drives:

- Be particularly diligent when viewing or editing shared files on a shared server.
- Do not leave documents open on a computer unattended if not actively working on them.
- If planning to edit a document, create a new file of the document, File – Save As – New Filename with editors initials and date.
- Do not make corrections if there is a notice that the file is open by another user (name provided) and you are asked to make a copy. This can result in two different versions being worked on at the same time. Notify the user and wait until the document is closed to open anew and edit.
- When clicking and dragging files or folders, be sure to place in the correct destination. Many a folder on the shared drive has been accidentally moved into another folder in error.
- Report any issues (accidental file or folder moves, accidental file deletions, etc.) to the Administrative Assistant for remediation.

Responsibility/Contacts: All LOPR Staff, Folder/Content Owners