

Tips and Best Practices for City Staff

City of McCall, Information Systems Department – 9/28/2017

Best practices for email

1. Each message we send or receive is probably a public record and should be, so to speak, ***suitable for publication in the newspaper***. Would that be OK? We probably won't get to withhold them later on.
2. Large attachments come back to bite us; they clog our inboxes and sent items. If they matter and don't already exist in our files, just save in the correct project folder and then remove the attachment from email.
3. You - and your email - are a critical part of the City's records management system.
 - a. Understand what messages can be, or must not be, deleted. Use the City of McCall **"Records retention schedule"** available from the City Clerk, as your guide. When in doubt, keep correspondence for 2 years. If project related, print / convert the email as Adobe PDF and save in the project files, then delete from email. Nothing must be kept specifically as email, but records must be kept in some form as directed.
 - b. Email is a daunting burden. Stay ahead of it; save-out and remove, or organize messages in sensible folders, or assign "categories" to significant items to help you manage, retain and locate them later. Delete strictly personal, junk or unsolicited email regularly. Those items aren't "records".
4. **Your Outlook "Online archive"** will receive any items 2+ years old. Don't neglect this archive when directed by the Clerk to discard or destroy outdated records each year.

Best practices for managing your files

1. **If you have a personal music, video or photo collection** available at work, you must make sure it is NOT located within your User files or on a City Server. For instance, keep those on your own flash drive, NOT in "Documents\<Whatever>". Large personal data collections have been found on our mission-critical servers, and may be permanently deleted or "discovered" by outside parties in the course of administering City infrastructure or responding to legal processes. **Please ask InfoSys staff for any help you need** to insure that your personal data is not ***suddenly deleted or disclosed*** without notice to you.
2. **Examine your "User" or "Department" filing system occasionally**, using the "search" feature in Windows. Right-click your top level folder, i.e., "My Documents", and choose some criteria to help you find very large, or very old files that may no longer be needed.
 - a. Find all "Huge" or "Gigantic" files. Do you need them? Are these duplicates or earlier drafts?
 - b. "Old" files may need attention, deletion, or just reorganization. Yes, it's nice to have a historical record, and some things must be kept indefinitely. But it's impossible to keep everything forever, so clean out the closet regularly. There are files up to 20 years old on our servers, not all of them important.

Remote Access to City Networks

Our VPN gives users a remote connection to resources on the internal City network. It's a helpful capability for staff who spend time on the road with a City laptop, or need to work from home occasionally. **Ask InfoSys staff for assistance** if you need VPN capability installed on your City laptop.

Standard Operating Procedures

- Do use a personal email account, from a personal device, for messages that aren't City business related, and shouldn't be part of the "record".
- Don't use a personal email account for personal business on a City computer. The messages will likely become public information, and "discoverable". Also, outside email is dangerous. It may not be pre-screened for viruses.
- Don't use City email for personal business or entertainment, and avoid large attachments that aren't work related.
- Don't use City resources for personal business, shopping, finance or entertainment unless your supervisor approves that use in writing. The use of public assets or funds for personal gain is unlawful in Idaho.
- Do ask InfoSys staff for assistance if you need additional software on your City computer. Often, we can help determine the best, safest and least costly way to get that done for you. Sometimes, though, our best advice will be to stay away from programs or add-ins that could hurt security or damage your system.
- Don't preemptively install software and ask for forgiveness later; the damage may be done by then.
- Do expect questionable or dangerous software or files to vanish from your system without someone asking you first.
- Do use "Helpdesk" when possible, whenever you have a request or problem. If you need assistance, a simple email to helpdesk@mccall.id.us or – even better- a web request at <http://helpdesk> (yes, that's the whole address if you're in the office) will get our attention. Using "helpdesk" creates proper records and helps insure good follow up.