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Managing and Saving Entries for Third-Party Forms on Files on the Go (FOTG) Standard Operating Procedure

Purpose

To ensure that all entries submitted through third-party forms are securely and consistently stored in their respective program folders on Files on the Go (FOTG).

Scope

This procedure applies to all team members responsible for handling data submissions received through third-party forms across all REDI and MWBC programs.

Responsibilities

- **Program Leads:**
    - Works with Marketing and Events Manager/Marketing staff to specify and verify data fields for the creation of third-party forms;
    - Creates FOTG folders for retaining data submissions from third-party forms;
    - Identifies and corrects file retention errors on FOTG.
- **Marketing and Events Manager or Marketing staff:**
    - Works with Program Leads to develop third-party forms;
    - Monitors, manages, and modifies third-party forms as directed by Program Leads;
    - Extracts and saves data submissions to the folder/s assigned by Program Leads.
- **IT Support:**
    - Maintains the FOTG system;
    - Troubleshoots and assists with FOTG technical issues.

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Procedure

1. Accessing Third-Party Forms

- Log into the third-party platform where the form is hosted (e.g., Google Forms, WP Forms, FunnelWhrl, Typeform, JotForm, etc).
- Navigate to the form's submission data.
- Export the data in a format that maintains the context and content needed for the program (e.g., as a CSV with headers or PDF file with data entry fields).

2. Organizing Files on FOTG

- Open Files on the Go (FOTG).
- Navigate to the folder of the corresponding program:
    - Example: *Global Bites Event 2024* folder for 2024 restaurant and vendor application to the Global Bites program.
    - Example: *Shop Local Winter 2025* folder for applications to the 2025 Winter cohort of the MWBC Shop Local program

3. Saving the Data

- Name the file using the following naming convention:
    - [ProgramName]_[FormName.Applicant]_[Date MM.DD.YY]
        - Please note the date should record the date the form entry was submitted.
    - Example: Global Bites 2024_Dining Days Applicants.Poyoteca_12.05.23
- If a program has multiple options using the same form, the naming convention of the each saved entry should include the variable:
    - [Program Name_[FormName.Variable.Applicant]_[Date MM.DD.YY]
    - Examples: Shop Local_Summer 2025 Applicants.Bowie.Awesome Candles_5.16.25

      Shop Local_Summer 2025 Applicants.Savage Mill.Perfumery_5.16.25
- Save the file in the relevant program's folder on FOTG.

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4. Quality Check

- Program Managers should verify that the saved file is complete and correctly named, and confirm the file's placement in the appropriate folder.

5. Notification

- The Marketing and Events Manager/Marketing staff should notify relevant program leads (if required) that the form entry has been saved.

Compliance

- Team members must adhere to this SOP to ensure data integrity, security, and accessibility, and compliance with Freedom of Information Act (FOIA).
- Regular audits should be conducted by Program Managers to verify compliance.

Exceptions

- Any deviations from this procedure must be approved by the Chief Executive Officer.

Review and Updates

- This SOP will be reviewed as needed to ensure alignment with organizational practices.
