Organizational Placement   **Schedule number:** 2013-0003
Agency: Metro
Department: Information Services
Program: Administration

Program Description
IS Administration provides strategic planning, direction, and central management oversight of the Information Services that includes the following programs: Desktop Support Services, Enterprise Application Services, Systems Architecture Services, IS Project Management Office, and Records and Information Management.

IS Administration ensures that the programs work in close cooperation with each other to effectively provide the full range of integrated information technology services throughout the agency. The program also provides oversight in terms of development and administration of contracts with vendors providing hardware, software, or services, and oversees project implementation and information security.

Records Description:
The development, review, and approval of strategic plans of the department are documented in **Information Management Services Strategic Plan Records**. Records documenting the planning and development of information systems are **Information System Planning and Development Records**. Records documenting the activities and performance of the department are **Monthly Report to the Chief Financial Officer**. The department's responses to the Metro Auditor's performance audit reports are documented by **Performance Audit Report Responses**.

Program Records
M12-01-01 Information Management Services Strategic Plan Records
          Minimum retention:
          (a) Final plans: 20 years
          (b) All other records: 5 years after final plan produced
M12-01-02 Information System Planning and Development Records
          Minimum retention:
          (a) Implemented systems: Life of the system
          (b) Unimplemented systems: 3 years
M12-01-04 Monthly Report to the Chief Financial Officer
          Minimum retention: 2 years
M12-01-05 Performance Audit Report Responses
          Minimum retention: Until next performance audit completed

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Budget preparation records, calendars and scheduling records, correspondence, policy and procedure guidelines and manuals, seminar and conference records, and staff meeting records.

Databases
KRONOS
PEOPLESOFT
TRACK-IT
HP TRIM

Organizational Placement   **Schedule number:** 2013-0003
Agency: Metro
Department: Information Services
Program: Desktop Support Services

Program Description
The Desktop Support Services Program provides computer hardware and application installation to all desktop users. The program also works closely with all Metro departments to develop hardware and software configuration requirements and to advise on purchasing strategies.

The program operates Metro's Helpdesk which proactively responds to technology incidents that negatively impact operations or the ability for users to accomplish their technology related tasks. The program will introduce new technologies where business appropriate, and retire systems that are no longer supported.

The program coordinates with the Purchasing program to ensure that computer systems, hardware, and software are purchased efficiently. The program also procures, manages and tracks software licenses for all desktop systems owned by the Agency.

The program provides user education ranging from just-in-time user training, educational e-mail communication, online documentation and live or recorded training sessions.

In addition, this program works in close cooperation with the other Information Services Department programs in order to effectively provide the full range of integrated information technology services throughout the agency.

Records Description:
The development and presentation or distribution of instructional materials such as tutorials, technical procedures, user's guides, and handbooks is documented by **User Training Records.** Records documenting troubleshooting and problem-solving assistance provided to system users through the helpdesk are **User Support Records**.

Program Records
M12-02-03 User Support Records
          Minimum retention: 1 year
M12-02-02 User Training Records
          Minimum retention: 1 year after superseded or obsolete

Consult General Administrative Records for records series commonly retained by Metro, including but not limited to: Calendar and scheduling records, correspondence, equipment maintenance records, policy and procedure guidelines and manuals, project records, work orders, and work schedules and assignment records.

Databases
None

Organizational Placement   **Schedule number:** 2013-0003
Agency: Metro
Department: Information Services
Program: Enterprise Application Services

Program Description
The Enterprise Application Services program provides technical development and maintenance support for all enterprise applications. Its primary focus is on PeopleSoft financial and human resource systems. This program performs database administration, security administration, and system performance management to ensure the effective operation of the PeopleSoft financial and human resource management information system throughout the agency.

This program also establishes procedures and guidelines for various applications to support user needs. It troubleshoots applications to resolve system user problems and to monitor and enhance system performance. It installs upgrades to enterprise applications and interfaces. It also creates and maintains documentation of proprietary, modified, and custom designed programs. Program staff also acts as liaison with multiple software vendors and contracted support vendors.

The program also performs quality assurance and data security functions to help control the integrity and security of enterprise information.

This program works in close cooperation with the other Information Services programs in order to effectively provide the full range of integrated information technology services throughout the agency.

Records Description
Processes involved with computer system program documentation are **Computer System Program Documentation Records**.

Program Records
M12-03-04 Computer System Program Documentation Records
Records documenting the addition, modification, or removal of software from a computer system. Records usually fall into six categories:
1. Records that document operating systems;
2. Records that document the in-house creation and modification of application programs;
3. Records that document the structure and form of data sets;
4. Records that document the use of commercial software packages;
5. Records that document the structure of the system; and
6. Records that document system-to-system communication.
SEE ALSO Software Management Records.
        Minimum retention:
        (a) Migration plans: Until superseded or obsolete
        (b) All other records: 1 year after system superseded or obsolete

Consult General Administrative Records for records series commonly retained by Metro, including but not limited to: Calendar and scheduling records, correspondence, equipment maintenance records, policy and procedure guidelines and manuals, project records, work orders, and work schedules and assignment records.

Databases
None

Organizational Placement   **Schedule number:** 2013-0003
Agency: Metro
Department: Information Services
Program: Project Management Office (PMO)

Program Description
Information Services (IS) Project Management Office (PMO) provides project management (PM) services for agency project proposals that meet the criteria of the IS PMO domain, including project intake, due diligence, client collaboration, and prioritization. In some cases the IS PMO manages approved projects.

In addition, the PMO Office coordinates activities of IS Project Prioritization Committee that prioritizes discretionary IS projects and makes recommendations to advance agency PM maturity. It also provides guidelines and framework for software application selection, implementation, upgrade, education and training.

Records Description:
The criteria and process for project intake and prioritization and the frameworks for software application selection, implementation, upgrade, education and training is documented by the **IS PMO Governance Records**. Project business case, outcomes, cost, staff effort, risk, and strategic alignment are documented by **Technology Project Proposal Records**. The activities and decisions of an internal executive steering committee for technology projects are documented by **IS Project Prioritization Committee Meeting Records**.

Program Records
M12-06-01 Information Services (IS) PMO Governance Records
          Minimum retention: 2 years after last updated
M12-06-02 Technology Project Proposal Records
          Minimum retention: 5 years
M12-06-03 IS Prioritization Committee Meeting Records
          Minimum retention: 5 years

Consult General Administrative Records for records series commonly retained by Metro, including but not limited to: Calendar and scheduling records, correspondence, project records, and work schedules and assignment records.

Databases
SharePoint

Organizational Placement   **Schedule number:** 2013-0003
Agency: Metro
Department: Information Services
Program: Records and Information Management (RIM)

Program Description
The Records and Information Management (RIM) program provides for the professional management of information from the time records are created and/or received through their processing, distribution, use and placement in a storage or retrieval system until their eventual destruction or permanent archival retention.

The RIM program is responsible for promoting knowledge of records and information management throughout the Agency and encouraging the use of records and information as a valuable corporate resource. The RIM program maintains the agency's records retention schedule; manages the off-site storage of inactive and permanent records; manages policy and procedures development and training; oversees the planning, deployment and administration of the agency's electronic document and records management system, HP TRIM; develops strategies for change management; and ensures the preservation of Metro's vital and historically significant records. The program also coordinates meetings of the Metro RIM Advisory Group consisting of RIM personnel and liaisons throughout the agency. In addition, The RIM program provides ongoing supervision of volunteers and students offering their time and assistance on special archival projects.

Records Description:
Records documenting requests for disclosure of public records and provide a record of agency responses are **Public Records Disclosure Request Records**. Records may include but are not limited to requests for disclosure, request logs, approvals, denials, copies of petitions to the Attorney General for review of denials of disclosure, Attorney General Orders to grant or deny disclosure, and correspondence. Records documenting the authorized retention, scheduling, inventory, and disposition of an agency's records are **Records Management Records**. Records may include but are not limited to State Archives Division records retention schedules, inventory worksheets, schedule authorizations, procedure guidelines, agency storage inventory lists, transmittals, destruction lists, destruction requests and authorizations, and correspondence. Permanent and historically significant records are documented in **Metro Special Collections**.

Program Records
M12-05-02 Public Records Disclosure Request Records
            Minimum retention:
            (a) Approved requests: 2 years
            (b) Denied requests: 2 years after last action
M12-05-01 Records Management Records
            Minimum retention:
            (a) Records documenting destructions, and accessions with permanent retentions: Permanent
            (b) Records retention schedules: 5 years after last update
            (c) Records inventories and storage records: Until superseded or obsolete
            (d) All other records: 5 years
M12-05-03 Metro Archives and Special Collections
            Minimum retention: Permanent

Consult the General Administrative Records for records series commonly retained by Metro, including but not limited to: Calendars and scheduling records, correspondence, professional membership records, policy and procedures guidelines and manuals, project records, and seminar and conference records.

Databases
HP TRIM
SHAREPOINT

Organizational Placement   **Schedule number:** 2013-0003
Agency: Metro
Department: Information Services
Program: Systems Architecture Services

Program Description
The Systems Architecture Services Program plans, implements, and manages installations, upgrades and retirements of Metro's network and information technology systems and services. The program also researches information technology trends and assesses their impact on the Metro business environment.

This program is responsible for the safety, integrity and confidentiality of all data through multiple means of securing, monitoring, logging, testing and backups.

This program works in close cooperation with the other Information Services Department programs in order to effectively provide the full range of integrated information technology services throughout the agency

Records Description:
Records documenting the development, planning, installation, and upgrades of Metro's information systems, and used to help ensure that installed systems will help the agency fulfill its missions, are cost-effective, conform to adopted standards, and integrate with existing systems are **Computer System Installation and Upgrade Records**. Records documenting the maintenance of computer systems and are used to ensure compliance with any warranties or service contracts; schedule regular maintenance and diagnose system or component problems; and document systems backups are **Computer System Maintenance Records.** Records documenting the security of computer systems, including employee access requests, passwords, access authorizations, encryption keys, and other related documentation are **Computer System Security Records**. Records documenting the design and wiring of Metro's computer systems and networks are **Network Cabling Records**. Records documenting security backups of network servers are **Network Server Security Backup Records**. Records documenting the creation, modification, or disposition of agency telecommunications systems are **Telecommunications System Management Records**.

Program Records
M12-04-01 Computer System Installation and Upgrade Records
        Minimum retention:
        (a) System or component installation or upgrade records: 1 year after life of system
        (b) Migration plans: Until superseded
M01-04-04 Computer System Maintenance Records
        Minimum retention:
        (a) Records related to system or component repair or service: Life of the system or component.
        (b) Records related to regular or essential records backups: 1 year after superseded or obsolete
M01-04-05 Computer System Security Records
        Minimum retention: 3 years after superseded or obsolete
M12-04-02 Network Cabling Records
         Minimum retention: Until superseded or obsolete
M12-04-03 Network Server Backup Documentation Records
         Minimum retention: 1 year after superseded or obsolete
M12-04-06 Telecommunications System Management Records
         Minimum retention: 1 year after system superseded or obsolete.

Consult General Administrative Records for records series commonly retained by Metro, including but not limited to: Calendar and scheduling records, correspondence, equipment maintenance records, policy and procedure guidelines and manuals, project records, work orders, and work schedules and assignment records.

Databases
ACTIVE DIRECTORIES
BAKBONE
S LOG