ADMINISTRATOR'S MEMORANDUM

To: State and Regional Offices   **Miscellaneous Memorandum No. 20**

From: Mat Weaver, Deputy Director

Date: December 14, 2020

RE: **Guidance and procedures for self-supported Information Technology Services**

BACKGROUND

In 2018 the Idaho Legislature passed House Bill 607, creating the Office of Information Technology Services. This bill was part of a larger *IT Modernization Initiative* ("Initiative"). The purpose of the Initiative is to enhance cybersecurity and increase efficiency in IT services across agencies and enable agencies to become IT consumers rather than IT providers. The Initiative removes IT services and staff from individual agencies and centralizes those services and job positions with the Office of Information Technology Services (ITS). The Initiative plans to take a phased approach over five years, with a target date of 2023 to move all executive agencies to centralized IT services. The Idaho Department of Water Resources ("Department" or "IDWR") was part of Phase 2 of the Initiative.

Phase 1 of the Initiative was effective on July 1, 2019, and included the modernization and consolidation of eight state agencies' IT services.[1] In combination, the Phase 1 agencies employ approximately 1,442 state employees who now receive most of their IT services from ITS.

Phase 2 of the Initiative was effective on July 1, 2020. In addition to the Department, seven State agencies were part of the modernization and consolidation (the Idaho Department of Corrections, the Idaho Department of Fish and Game, the Idaho Department of Environmental Quality, the Idaho State Department of Agriculture, the Idaho Department of Juvenile Corrections, and the Idaho Real Estate Commission). Phase 2 agencies, in combination, employ approximately 3,825 state employees.

As a result of the implementation of Phase 2 of the Initiative on July 1, 2020, ITS now supports IDWR staff and IT processes in the State office located in Boise and IDWR's regional offices: Western (Boise), Southern (Twin Falls), Eastern (Idaho Falls), Northern (Coeur d'Alene), and a satellite office located in Salmon.

ITS is now responsible for almost all of the Department's IT-related needs, including computers, networks, servers, phones, software (off the shelf and custom workflow applications), email, cybersecurity, databases, and new application development. However, ITS will not support some functions and duties previously carried out by IDWR's ITS Bureau staff, and IDWR staff remain responsible for carrying out these activities. This memo summarizes the Department's stay-behind IT-related activities, identifies responsible parties, and outlines processes and procedures for accomplishing those duties.

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[1] Phase 1 agencies included the Tax Commission, the Industrial Commission, the Public Utilities Commission, the Division of Building Safety, the Department of Finance, the Department of Insurance, the Division of Veterans Services, and the Division of Vocational Rehabilitation.

GENERAL IT NEEDS
In general, if an employee experiences an IT-related issue not included in this memo, the employee should submit a ticket to the ITS Service Desk. Tickets may be submitted via email (servicedesk@its.idaho.gov), online through the Service Desk portal (http://servicedesk.idaho.gov), or via phone (208-605-4000). Employees are expected to follow established IDWR procedures and approval processes for purchases and network and application permissions.

BUILDING SECURITY
State Office
The Purchasing Section oversees building security for the state office. New employee access or existing employee changes to access should coordinate through them.

Regional Offices
As the IDWR IT Bureau was not involved in regional office building security, there are no regional office changes.

COPIERS, PRINTERS, PLOTTERS
Everyone who uses printers, copiers, and multi-function devices should have a basic understanding of how to use them. Employees are expected to:
- Replace paper
- Remove paper jams
- Troubleshoot basic error messages

Employees in the State Office should contact the Purchasing Section for changing toner, staple cartridges, and any error messages the employee is unable to address. Employees in the regional or satellite offices should change toner and staple cartridges and handle error messages according to their established protocols. The equipment provider (not ITS) maintains printers and multi-function devices. Do not send a ticket to ITS for printer or copier issues.

The GIS Section is responsible for paper, toner, and general upkeep of the plotters and large format scanner. Employees should contact gisinfo@idwr.idaho.gov for help with plotters.

DATABASE SUPPORT
ITS is the primary point-of-contact for the majority of database support issues. IDWR employees should contact the ITS Help Desk for bulk data loads, table maintenance, general support, backup and recovery, data entry error corrections, record deletion, run SQL Server Integration Services scripts for production data update, bulk load GIS data to production, database test or development, comprehensive database changes or updates, and changes to security access (i.e., who can get into the databases). ITS will seek permission from the responsible IDWR manager ("SAR Approver") before making a database or software change. What ITS will *not* do is create individual database queries for Access, SQL Server Management Studio (SMS), or Excel. IDWR employees are responsible for running their own reports from the various databases not currently supported in Workflow.

GIS SUPPORT
GIS Support remains largely unchanged. For GIS licensing questions and GIS help, including GIS data, interactive maps, ArcMap, WrEdit, or Survey 123 support, please contact the GIS Section (gisinfo@idwr.idaho.gov). The GIS team will help determine if the issue is something IDWR can address on its own or if it needs additional assistance from ITS.

INFRASTRUCTURE POWER ON & OFF SUPPORT
Occasionally, in order for ITS to support IDWR's IT systems, a piece of equipment (e.g., server) needs to be powered off and then powered on. ITS will work with individual users to power on and off individual end-user machines (e.g., desktop computer or conference room computer). ITS will work with identified staff to power on and off servers or other infrastructure systems. In the state office, identified staff include the Deputy Director, the GIS Section Manager, the Purchasing Manager, and the Buyer. In regional offices, the identified staff consists of the Regional Managers.

IT PURCHASE REQUESTS
IDWR staff shall continue to use IDWR's standard and preexisting purchase processes and forms to request new IT equipment and software. Please refer to IDWR's *Purchasing Policy and Procedures* and *Purchasing Request Form*. The *Purchasing Policy and Procedures* establish the purchasing system used by IDWR and create a centralized purchasing operation to procure all equipment, supplies, software, and services.

IDWR staff should not use ITS purchasing processes within the ITS Service Desk. Regular IDWR staff are not expected to coordinate with ITS when requesting new IT equipment, software, or software renewals. IDWR staff should continue to submit purchase requests through the Purchasing Section, and Purchasing staff will consult with ITS regarding IT purchases, including submitting a Service Desk ticket when necessary. IDWR Purchasing will coordinate the delivery and deployment of IT purchases with the requestor.

ITS DEPARTMENT-WIDE NOTIFICATIONS
Occasionally, ITS will send notifications to the agencies it serves. Notifications can include network shutdowns, planned maintenance, know IT-related issues, and cybersecurity concerns. ITS sends these notices out to its wide area network distribution list or "WANlist." The WANlist includes representatives from all agencies served by ITS. Representatives at each agency are responsible for evaluating the notice, determining the agency staff affected by the notice, and promptly forwarding the notice to the affected group. WANlist representatives at IDWR include the GIS Section Manager and the Deputy Director.

MEETING SUPPORT
As the meeting host, IDWR employees are expected to set up the meeting room and technology. Below is general information about the available rooms, equipment, and software. Detailed instructions are posted on WEnet. Employees are encouraged to seek assistance in advance of the meeting if they do not know how to set something up. For help with any of the items listed below, contact the Director's Administrative Assistant.
Tip: don't wait until the last minute to set up your physical or virtual meeting room.

Conference Rooms
Employees must schedule conference rooms using Outlook (see the IDWR Conference Room Policy). The appointment should allow enough time for room set up and breakdown. *Tip: Employees can schedule two meetings from their calendar – one invite to the meeting room(s) to include set up and breakdown time, and one to attendees with the actual meeting time.*

In the State Office, conference rooms 602A, B, C, and D can be combined to form larger rooms; employees must reserve all rooms needed in Outlook. Instructions for opening and closing the partitions are posted on WEnet. For assistance with partitions, employees should contact the Purchasing Section.

Each conference room contains detailed information on its equipment and features.

<u>Audio Visual Equipment</u>
Most of the conference rooms have a network-connected computer and TV screen for presentations and document sharing. Employees may log on to the computer using the same login information they use at their desks. Employees should log off the computer when the meeting is complete and turn off the TV. The computer should be left on.

To facilitate videoconferencing, IDWR plans to purchase and install cameras, speakers, microphones, and related equipment in most of the State Office conference rooms and the regional office conference rooms. Detailed instructions and training will be available after installation.

<u>Conference Calls</u>
Each meeting room is equipped with a teleconference phone (except 602A). There are different options available for conference calls depending on the number of participants. If only one person needs to call in, they may call the conference room directly. Similarly, employees may dial out from the conference room phone like they would any other phone. For calls of up to eight participants, each phone has a "MeetMe" option *(instructions)*. For larger groups, employees can use GlobalMeet. Select individuals and sections have GlobalMeet audio accounts. Each account holder manages access to their account differently. Contact the Fiscal Officer for a list of account holders.

<u>Virtual Meetings</u>
There are many virtual meeting providers on the market. IDWR purchased GoToMeeting and Zoom licenses for meetings that the Department hosts. As these are shared licenses used by everyone in the Department, employees must reserve licenses before use. There is one GoToMeeting license which is set up as a resource in Outlook (*instructions*). The Zoom license has ten individual users. To reserve a Zoom license, contact the Director's Administrative Assistant. Employees may participate in other virtual meetings set up by someone outside the Department using other platforms.

Virtual meeting software is designed with the idea that hosts and participants use their own individual computer audio and cameras. If hosting a virtual meeting in a conference room, using the phone will produce better audio results. GoToMeeting and Zoom both have phone numbers when a meeting is set up.

For help setting up a virtual meeting, contact the Director's Administrative Assistant.

ON-SITE SURPLUS AND SPARE IT EQUIPMENT DEPLOYMENT
IT equipment, like any other piece of property, belongs to IDWR; the Department counts and inventories all property carefully. IT equipment includes computers, laptops, phones, monitors, tablets, keyboards, mice, etc. The Purchasing Section manages the deployment and disposal of property, including IT equipment. If an employee needs a piece of IT equipment, they should check with the Purchasing Section to determine if it is available. If an IDWR employee has a piece of IT equipment they no longer use, they must contact the Purchasing Section for proper disposal. Employees should not dispose of IT

equipment unless directed to do so by the Purchasing Section. Employees must also inform the Purchasing Section if a piece of equipment is taken offsite for maintenance.

IT Equipment Disposal

When a piece of IT equipment is ready for disposal, the IDWR Purchasing Section and ITS are jointly responsible for disposal. In general, any piece of IT equipment that is past its warranty date will not be supported by ITS and should be disposed of upon replacement. Appropriate staff at IDWR and ITS should adhere to the following process when disposing of IT equipment.

1. ITS shall confirm whether the piece of equipment is still under warranty.
2. If the equipment is still under warranty, ITS shall coordinate with IDWR Purchasing as to how/if to reuse it.
3. If the equipment is not under warranty, ITS will take possession of the equipment for disposal.
4. ITS will notify IDWR Purchasing staff via email that (a) the equipment is out of warranty, (b) they plan to dispose of the equipment, and (c) the inventory identification number.
5. Before removal from the State Network, ITS will de-authorize any ESRI Licensing and coordinate with IDWR GIS on any license reauthorization on replacement machine(s) per procedures established between IDWR and GIS.
6. ITS will remove all hard drives and destroy them.
7. ITS will physically remove the inventory tag and throw it away. As long as the tag is removed from the equipment before disposal, IDWR does not need to physically retain the tag.
8. ITS can dispose of the equipment per its standard practice (e.g., charitable donation).

PUBLIC WEBPAGE CONTENT MANAGEMENT

Until further notice, ITS staff are responsible for content management of IDWR's public webpage. IDWR employees should request the placement, removal, or modification of webpage content and published materials through the ITS Help Desk. Please plan ahead and allow one to two weeks for ITS to update web content. When employees need to update web content in an expedited manner, they should indicate the urgency in their Help Desk requests. Calling the Help Desk directly is also a good idea when web content must be published with a short turnaround or a specific date. For very urgent or critical web content, staff can coordinate with the Director's Administrative Assistant to expedite the publication.

READER BOARD, STATE OFFICE

The State Office has access to the University of Idaho digital reader board. IDWR may use this digital space for advertising public meetings and events in the office. To add an event to the reader board, IDWR staff should email the front desk Office Specialist (idwrinfo@idwr.idaho.gov).

SERVER ROOM SUPPORT

If ITS staff or IDWR staff need to access a server room, the person requiring access shall work with identified staff to resolve their need. In the state office, identified staff include the Deputy Director, the GIS Section Manager, the Purchasing Manager, and the Buyer. In regional offices, the identified staff consists of the Regional Managers. Equipment may not be removed from the server room without approval from Purchasing, GIS, or the Deputy Director.

SYSTEM ACCESS REQUESTS (NEW EMPLOYEE SETUP, SEPARATIONS, SYSTEM ACCESS CHANGES)

When hiring new employees, separating from existing employees, or taking other actions that require modifications to an employee's IT system access details, managers must work with IDWR HR as well as submit a SAR (System Access Request) through the online ITS Service Desk Portal. The SAR is the

interface process managers must use to deploy IT hardware and create or modify employee IT accounts, permissions, and licenses.

New Hire or Re-hire
As soon as a new employee has accepted an offer of employment, the manager must submit a SAR to ITS to ensure that when the employee starts work, they have all of the appropriate hardware, accounts, software installs, and permissions needed to carry out their work. Hiring managers should allow two weeks for ITS to process and execute a SAR.

To submit a SAR, hiring managers must log on to the ITS Service Desk and go through the seven-step process to fill out and submit a SAR. A SAR requires "Manager Approval" before ITS will fullfill the request. The "Manager Approval" occurs at the hiring manager level. When submitting a SAR, the hiring manager should identify themselves as the Manager Approval required under step one of the SAR. In step one, the hiring manager must also specify whether the new employee is new to the Department or a re-hire.

Steps two, three, and four of the process are fairly self-explanatory. Under step five, the hiring manager must identify whether the new hire will need a standard IDWR email account (e.g., jane.doe@idwr.idaho.gov email address). Until further notice, IDWR does not use Office 365, so the hiring manager should not check the Office 365 box. In step five, the hiring managers must also identify non-standard applications the new employee will need to carry out their job. Non-standard means any software applications needed by an employee to do their job that ITS does not install on all IDWR computers.[2] The hiring manager should also identify which Workflow Menus[3] the employee will need to access.

Step six requires the hiring manager to enter special instructions and notes needed to get the new hire fully supported. Examples of special instruction could include special software licensing requirements (e.g., MathCAD install), identification of a dedicated printer, special hardware requirements (e.g., left-handed keyboard, digitizer, etc.), or detailed instructions as to where to set up hardware. The hiring manager also can attach documents further detailing special IT needs under step six.

Step seven requires the hiring manager to identify the "effective date," which in most instances for a new hire, would be their first day of in-office work.

Change
Whenever there is a change to an employee's IT profile, the employee's supervisor must submit a SAR to process the changes. Examples of changes include an employee promotion or lateral transfer, a change in the employee's physical office, or a name change. To complete a change SAR, the supervisor should select "change" under step one of the SAR and then specify the needed change in subsequent steps.

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[2] Non-standard software applications used by some but not all IDWR staff may include Adobe Pro, Aquarius, WISKI, Jolly Giant, Deed Plotter, ArcInfo, Surfer, Visual Studio, and others.
[3] IDWR Workflow Menus include Adjudication, Bar Code, Dam Safety, Enforcement, File Inventory, Fiscal, Hydrologic, Receipting, Stream Channel, Support Services, Underground Injection Control, Water Management, Water Rights, Water Supply Bank, and Well Construction.

<u>Separation</u>
When an employee separates from IDWR, the employee's supervisor must first coordinate with IDWR HR personnel before submitting a SAR. Separation can include retirement, resignation, or termination. To complete a separation SAR, the supervisor should select "separation" under step one of the SAR and then specify the separation details in subsequent steps. An important aspect of completing a separation SAR, is the correct identification of the "effective date" in step one. The effective date for separation is when IDWR severs an employee's access to IDWR IT hardware, software, and accounts. The effective date of separation date may or may not occur before the termination date, therefore supervisors should coordinate an employee's effective date with HR.

WENET CONTENT MANAGEMENT
Until further notice, ITS staff is responsible for content management of IDWR's WEnet. IDWR employees responsible for publishing materials to WEnet should request the placement, removal, or modification of WEnet content and published materials through the ITS Help Desk. Please plan ahead and allow one to two weeks for ITS to update WEnet content. When employees need to update WEnet content in an expedited manner, they should indicate the urgency in their Help Desk requests. Calling the Help Desk directly is also a good idea when WEnet content must be published with a short turnaround or a specific date. For very urgent or critical WEnet content publications, staff can coordinate with the Director's Administrative Assistant to expedite the publication.[4]

WORKFLOW APPLICATION USER SUPPORT
While IDWR staff will work with ITS for major support and enhancements of the various workflow applications, there are many knowledgeable employees within the Department who can address initial questions and issues and determine if those issues can be handled internally or if ITS assistance is needed. The table below identifies commonly used applications and the point of contact for questions about that application.

Workflow Application Area	Point of Contact
Administration	Glen Gardiner
Dam Safety	Dam Safety Program Manager (currently John Falk)
Enforcement	Water Distribution Section Mgr. (currently Rob Whitney)
Fiscal & Receipting	Financial Officer (currently Sascha Marston)
Water Accounting & WellSite	Hydrology Section Manager (currently Sean Vincent)
Stream Channel Alteration	Stream Channel Protection Program Mgr. (currently Aaron Golart)
Underground Injection Wells	UIC Program Mgr. (currently Nate Fischer)
Water Management	Water Distribution Section Mg. (currently Rob Whitney)
Water Rights	Water Rights Helpdesk (waterrightshelpdesk@idwr.idaho.gov)
Water Supply Bank	Water Supply Bank Program Mgr. (currently Remington Buyer)
Well Construction	Ground Water Protection Program Mgr. (currently Erik Boe)
GIS portion of Workflow Applications	GIS Section (gisinfo@idwr.idaho.gov)

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[4] IDWR is working with ITS to convert its public webpage and WEnet to WordPress so that IDWR employees can take over content management of both spaces. This guidance will be updated in the future as web publication directions change.