

**DEPARTMENT OF GENERAL SERVICES
RECORDS MANAGEMENT DIVISION
RECORDS RETENTION AND DISPOSAL SCHEDULE**

Schedule No. C1185

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Agency- **Montgomery County
Department of Technology Services**

Division/Unit

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Schedule Approved by Department, Agency, or Division Representative.

Date December 12, 2012

Signature

Edward Buchanan

Typed Name Edward Buchanan

Title Government Records Coordinator

Schedule Authorized by State Archivist

Date

2/4/2013

Signature

Edward C. [unclear]

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		Division/Unit Administrative Record Series
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1-1	<p><u>Equipment Inventory</u></p> <p>Enterprise Applications and Solutions</p> <p>Inventory records of all County desktops and laptop computers. Records include: Client ID, Location, Seat type, Description, Department, Make, Model, Age, Ship date, Warranty information, Computer name, etc.</p>	Destroy 1 year after equipment is no longer in use.
1-2	<p><u>Phone Calls</u></p> <p>Enterprise Telecommunications Services</p> <p>Records of phone calls made to and from the County from the PBX (Private Branch Exchange) system.</p>	Retain 1 year, then destroy.
1-3	<p><u>Billing Records</u></p> <p>Enterprise Telecommunications Services</p> <p>Each year departments are charged for phone usage, this report is generated from compiled monthly data from the call accounting system.</p>	Non-permanent. Screen every 5 years and destroy all material not needed for conduct of business.
1-4	<p><u>Desktop Computer Management (DCM) Dashboards</u></p> <p>Enterprise Applications and Solutions</p> <p>Desktop Computer Management (DCM) metrics relating to program performance and contractual Service Level Agreement (SLA) requirements</p>	Non-permanent. Screen every 10 years and destroy all material not needed for conduct of business.
1-5	<p><u>IT Records - Operational Support</u></p> <p>Enterprise Applications and Solutions</p> <p>Operational Support include: On-line Help Documentation, FAQ's, Help Desk Response Plans</p>	Non-permanent. Screen every 5 years and destroy all material not needed for conduct of business.

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1-6	<u>Asset Management System</u> Enterprise Telecommunications Services Online database for control and tracking of the Public Safety mobile and portable radios as well as radio infrastructure inventory and parts tracking.	Destroy 1 year after equipment is no longer in use.
1-7	<u>Telephone Service Request</u> Enterprise Telecommunications Services Requests for telephone service, troubleshooting, name changes, phone number changes.	Retain 1 year, then destroy.
1-8	<u>Data Center Operational Procedures</u> Enterprise Systems & Operations Data Center Operations Procedures	Permanent. Screen every 10 years and transfer superseded versions to State Archives.
1-9	<u>Cable Compliance Administrative Records</u> Cable Office Compliance records, client correspondence, reports of investigations, notices, etc related to cable compliance.	Screen every three years and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, legal, or historical value.

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1-10	<u>Procedures and Methodologies</u> Enterprise Services and Strategic Planning Office Contract Support Office procedures, Project Management Methodology, Project Management templates	Screen quarterly, and destroy material that is no longer needed to conduct business.
1-11	<u>Rate Regulation Records</u> Cable Office Records and documents related to rate regulations.	Screen every 5 years and destroy all material not needed for conduct of business.
1-12	<u>Audit Records</u> Management Services Contents may include: Data Security Audits, Purchasing Card Audits, FiberNet Audit	Retain 5 years or until all audit requirements have been met, whichever is later, then destroy.
1-13	<u>IT Survey Records</u> Management Services Surveys completed by the Department of Technology Services, including: The Digital Counties Survey and Gartner Survey.	Screen every three years and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, legal, or historical value.

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1-14	<p><u>Cable Franchise Agreement records</u></p> <p>Cable Office</p> <p>Documents related to the establishment, enforcement, continuation or termination of cable franchise agreements. Includes correspondence, meeting notes, franchise agreements, amendments, violation notices, settlements, and all other documents related to the Cable Franchise agreements.</p>	Non-permanent. Retain 15 years from expiration of agreement or until all audit requirements have been met, whichever is later, then destroy if not longer needed.
1-15	<p><u>Legislative and Regulation working files</u></p> <p>Cable Office</p> <p>Documents related to bills regulations, both national and local level. Includes review letters, fiscal notes, departmental analysis, public comments, attorney reports and notes, and impact statements.</p>	Screen every 10 years and destroy all material that is obsolete, superseded or the administrative need is met, with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, legal, or historical value.

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Division/Unit
Compliance Record Series

Item No.	Description	Retention
3-1	<p><u>Cable Compliance Records</u></p> <p>Cable Office</p> <p>Guidelines, policies and procedures for cable compliance inspections and complaint handling, including database.</p>	<p>Retain 6 years from the date of creation or 6 years from the date the franchise agreement is last in effect, whichever is later, destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archives for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, legal, or historical value.</p>

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5-1	<u>Bi-Directional Amplifier Records</u> Enterprise Telecommunications Services As Built Engineering Drawings and Diagrams of Bi-Directional Amplifier locations, circuitry and equipment	Retain 10 years, then destroy.
5-2	<u>Tower Applications</u> Cable Office Tower applications and other supporting documents. Records may be kept at Contractor's location.	Retain for 7 years or until all audit requirements have been fulfilled, whichever is later then destroy.
5-3	<u>Work Request records</u> Cable Office Work requests for facility work. Includes requests for tower/fiber maintenance.	Retain 7 years after facility is vacated by Montgomery County Government, and then destroy.
5-4	<u>Equipment Manuals</u> Cable Office Manuals for various equipment including video equipment.	Retain 7 years after equipment/ furniture no longer in use, and then destroy.
5-5	<u>Disaster and Emergency Management Plans</u> Cable Office Includes plans for evacuations, operations in the event of a disaster, Technical Operations Center (TOC) plans, etc.	Continuous record. Maintain as a perpetual file by updating when amended.

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5-6	<p><u>Inspection Reports</u></p> <p>Cable Office</p> <p>Records concerning the maintenance, repair and inspection of municipal owned facilities. Including plumbing, electrical, fire and other systems. Includes Tower inspection reports.</p>	Retain 7 years after facility is vacated by Montgomery County Government, and then destroy.

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7-1	<p><u>System Documentation</u></p> <p>Enterprise Systems & Operations</p> <p>System configurations, diagrams, hardware/software infrastructure, workflow records, systems specifications, etc.</p>	Destroy 1 year after system is superseded or obsolete.
7-2	<p><u>Montgomery County Government Enterprise Architecture</u></p> <p>Enterprise Services and Strategic Planning Office</p> <p>The Montgomery County Government Enterprise Architecture consists of five separate sub-architectures: Business, Technical, Data, Application, and Performance. Each one of the sub-architectures is a standalone document but all five are subcomponents of the entire Enterprise Architecture.</p> <p>The Enterprise Architecture communicates: the results of County business decisions (related to IT); the County IT Architecture and infrastructure; how the County manages its data; and how the County builds or acquires applications.</p> <p>In general, it communicates how the organization has invested in its IT infrastructure (including hardware, software, processes and people). The County continues to make significant investments in IT and must communicate to many parties how future investments align or impact the architecture and infrastructure.</p>	Permanent. Screen every 10 years and transfer superseded versions to State Archives.
7-3	<p><u>Application Development Program and Project Records</u></p> <p>Enterprise Applications and Solutions</p> <p>Programs and Projects include: Web Portal Program Governance and Stakeholder Meeting Documentation, Project Plans / Schedules, Project Requirements, Project Summaries, Testing / Training Documentation, all related Operational Support documentation.</p>	Screen every 5 years and destroy material that is no longer needed for current business with the following exception: Transfer to the Maryland State Archive for permanent retention any material that serves to document the origin, development, and accomplishments of the office and has continuing administrative, fiscal, legal, or historical value.

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7-4	<p><u>Enterprise GIS Database Records</u></p> <p>Enterprise Application and Solutions</p> <p>A collection of Geographic Information Systems (GIS) data layers serving the needs of two or more County departments. GIS Data Layers – A GIS data layer is a collection of similar features (e.g., building footprints, hospital locations, etc.) for a given geographic area (e.g., Montgomery County, State of Maryland, Fire/Rescue Service Area 01, etc.) The data layer has two major components: 1) X,Y coordinate pairs describing the point locations, the linear features, or enclosed areas; and 2) attribute items describing the characteristics of the graphic features (such as building square footage, hospital beds). Data layers can be grouped into categories (datasets) such as transportation, land use, public safety. A collection of categories structured within a Database management system is a GIS Database. GIS data layers are being updated on bi-annual, annual, quarterly, monthly, or weekly bases. DTS maintains backup copies of the latest versions of the data layers selected to participate in the GIS Database.</p>	<p>GIS data layers are updated on an on-going basis. Transfer to the Archives retired data sets and periodically transfer complete data sets at mutually agreed upon intervals and transfer methods.</p>
7-5	<p><u>IT Service Desk Ticketing Systems</u></p> <p>Enterprise Telecommunications Solutions</p> <p>IT Help Desk Incident ticketing system, tracking all IT support calls for County equipment and County users</p>	<p>Retain 1 year, then destroy.</p>
7-6	<p><u>Vulcan Vulnerability System Management Applications</u></p> <p>Security</p> <p>This is a software tool to manage the County's information security vulnerability program and system. Components of this include a change control database, vulnerability reports, issues/bugs, and daily operational status reports.</p>	<p>Retain 25 years or 5 years after system is obsolete, whichever is earlier, then destroy.</p>
7-7	<p><u>Remote Access Virtual System Management Application</u></p> <p>Security</p> <p>User and system logs for the County's Enterprise Remote Access Virtual Private Network service.</p>	<p>Retain 25 years or 5 years after system is obsolete, whichever is earlier, then destroy.</p>

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Facility Record Series

Item No.	Description	Retention
7-8	<p><u>Mainframe Disaster Recovery Procedure</u></p> <p>Enterprise System & Operation</p> <p>The recovery procedure for the mainframe computers located at Montgomery County Data Center.</p>	Destroy 1 year after system is superseded or obsolete.
7-9	<p><u>iBoss URL Filtering Management application</u></p> <p>Security</p> <p>This is a software tool to manage the County's Internet filtering program and system. Components of this include a change control database, user reports, issues/bugs, and daily operational status reports.</p>	Retain 25 years or 5 years after system is obsolete, whichever is earlier, then destroy.
7-10	<p><u>Public Safety Software Release Records</u></p> <p>Enterprise Systems & Operations</p> <p>Software Releases The software received from our vendors and such is stored in a data repository as well as physical media as pertained. The software intake is categorized and given a unique Configuration Management identification number and processed accordingly. The following areas are managed: workstation Images, online & physical disks, Mobile Images, 3rd Software Deliveries, In-house software components.</p>	Destroy 1 year after system is superseded or obsolete.
7-11	<p><u>Enterprise Log Correlation</u></p> <p>Security</p> <p>Security logs from various Information Security systems and other IT Enterprise systems.</p>	Retain 25 years or 5 years after system is obsolete, whichever is earlier, then destroy.

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		Division/Unit IT Systems Record Series
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7-12	<u>Public Safety Security Audit Records</u> Enterprise Systems & Operations The security scans are done quarterly, thus these records are dynamic and uniquely generated.	Continuous record. Maintain as a perpetual file by updating when superseded.
7-13	<u>Systems application development documentation</u> Cable Office Program flowcharts, user guides, maintenance, etc related to video and on line video and transcribing.	Destroy 1 year after system is superseded or obsolete.
7-14	<u>System Security</u> Cable Office Disaster recovery and preparedness such as Storage Area Network (SAN) and Technical Operations Center (TOC).	Destroy 1 year after system is superseded or obsolete.
7-15	<u>iBoss Uniform Resource Locator (URL) employee web access logs</u> Security Enterprise Internet filter for employees.	Retain 1 year, then destroy.
7-16	<u>Public Safety Change Management Records</u> Enterprise Systems & Operations The change process is embedded in the bi-weekly Computer Aided Dispatch (CAD) work committee meetings. This process is recorded in the outcome minutes and the work performed is entered in the tracking system as mentioned. Note that the summary documentation is stored as part of the system documentation repository process.	Destroy 1 year after system is superseded or obsolete.

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7-17	<p><u>Public Safety Data System (PSDS) Documentation Records</u></p> <p>Enterprise Systems & Operations</p> <p>This documentation is located on the county share drives, thus protected and backed-up through the enterprise support teams. This includes the Public Safety Data System (PSDS) deployment, support and quality assurance documentation. This includes: Configuration notes, Release Notes, Process management, Nimble and Agile (NA) 7 Compliance documentation, Troubling shooting guides, Systems architecture, Workgroup Change Management for Public Safety Systems.</p>	Destroy 1 year after system is superseded or obsolete.
7-18	<p><u>System Documentation</u></p> <p>Cable Office</p> <p>Documentation of our hardware/software infrastructure related to Video and online video.</p>	Destroy 1 year after system is superseded or obsolete.
7-19	<p><u>Public Safety Configuration Management Records</u></p> <p>Enterprise Systems & Operations</p> <p>A configuration management tracking system is in place which all operations work is entered into the system, stored in a database and communicated out to the agencies as needed..</p>	Destroy 1 year after system is superseded or obsolete.
7-20	<p><u>Information Technology Infrastructure Library Based Repositories</u></p> <p>Enterprise Systems and Operations Division</p> <p>A custom web based server inventory and configuration management system and an enterprise information technology infrastructure library based inventory and monitoring system used to support the Enterprise Server Deployment Domain.</p>	Continuous record. Maintain as a perpetual file by updating when amended, when system is replaced or obsolete, destroy.

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Telecommunications Records

Item No.	Description	Retention
9-1	<p><u>Voice Mail</u></p> <p>Enterprise Telecommunications Services</p> <p>Digital recordings of voice messages.</p>	<p>Destroy after 14 days, or at user's discretion, whichever is earlier.</p>