

POSITION DUTY STATEMENT

STO 1000 (Rev 11/2025)

DIVISION OR BCA Information Technology (IT)					POSITION NUMBER (Agency-Unit-Class-Serial) 820-730-1402-		Position ID	
UNIT Workplace and Collaboration Services					CLASSIFICATION TITLE Information Technology Specialist I			
TIME BASE / TENURE Full Time/Permanent	CBID R01	WWG E	COI Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	MCR 1	WORKING TITLE Microsoft 365 Engineer			
LOCATION Sacramento					INCUMBENT		EFFECTIVE DATE	
STATE TREASURER'S OFFICE MISSION								
<p>The State Treasurer's Office (STO) provides banking services for state government with goals to minimize banking costs and maximize yield on investments. The Treasurer is responsible for the custody of all monies and securities belonging to or held in trust by the state; investment of temporarily idle state and local government monies; administration of the sale of state bonds, their redemption and interest payments; and payment of warrants drawn by the State Controller and other state agencies.</p>								
DIVISION OR BCA OVERVIEW								
<p>BRIEFLY DESCRIBE THE DIVISION/UNIT FUNCTIONS</p> <p>The Information Technology Division (ITD) is the internal technology service organization that provides information processing support to the Divisions of the State Treasurer's Office and its associated Boards, Commissions, and Financing Authorities. The mission of the ITD is to assist the Divisions, Boards, Commissions, and Financing Authorities in achieving their program objectives through the efficient and effective delivery of quality information technology products and services.</p> <p>This mission is accomplished through the combined efforts of several ITD teams: Cybersecurity, Technology Acquisition, Application Management, IT Service Desk, Collaboration Services, and Network and Systems Support. Working together, these IT teams offer a full range of services, including application development and modernization, data center and cloud services, information security, network engineering and support, infrastructure development, equipment and software procurement, desktop support, web presence, technology-related project management, and technical support for new and emerging technologies.</p>								
GENERAL STATEMENT								
<p>BRIEFLY (1 OR 2 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS</p> <p>Under direction of the Workplace and Collaboration Services Supervisor (an Information Technology Supervisor II), candidate will hold operational responsibility for Microsoft 365 technologies in ITD.</p> <p>The Microsoft 365 Engineer is responsible for managing the configuration and delivery of a range of IT services related to workplace productivity and collaboration tools, specifically Microsoft 365 technologies. This role ensures efficient and effective operation of these technologies.</p>								
% of time performing duties		Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first.						
40%		<p>Work independently, as well as collaboratively with other Workplace and Collaboration Services staff, to carry out some or all of the following tasks as directed by the reporting manager:</p> <p>Identity and Access Management</p> <ul style="list-style-type: none"> • Configure and manage Microsoft Entra ID to ensure secure and efficient user access to systems and resources. • Configure and manage on-premises Active Directory and associated services. • Implement and enforce identity and access policies and best practices. <p>Email Services</p> <ul style="list-style-type: none"> • Configure and manage Microsoft Exchange Online email services to ensure reliable communication for all users. <p>Messaging and Collaboration</p> <ul style="list-style-type: none"> • Configure and manage messaging and collaboration tools, including Microsoft Teams and Polycom, to facilitate effective communication and collaboration among employees. <p>Endpoint Management</p>						

	<ul style="list-style-type: none"> • Configure and manage Microsoft Intune to ensure secure and compliant mobile device management, cloud connected and on-premises endpoints management including software distribution and updates/patches. • Manage Microsoft Defender to ensure endpoint security. <p>Data Loss Prevention</p> <ul style="list-style-type: none"> • Implement and monitor data loss prevention measures using Microsoft Purview to protect sensitive information. <p>File Sharing and Storage</p> <ul style="list-style-type: none"> • Configure and manage file sharing and storage solutions, including file servers and Microsoft OneDrive, ensuring data accessibility and security. <p>Document and Enterprise Content Management</p> <ul style="list-style-type: none"> • Configure and manage document and enterprise content management systems, including Microsoft SharePoint Online and KnowledgeLake, to maintain organized and accessible information repositories.
20%	<p>Windows Imaging and Deployment</p> <ul style="list-style-type: none"> • Design, build, and maintain standardized Windows 11 gold images using modern deployment practices (Autopilot, Intune, cloud-native provisioning, and configuration profiles). • Engineer and automate device provisioning workflows including Entra ID join, Intune enrollment, compliance policies, and security baselines. • Package, test, and deploy enterprise applications using Microsoft Intune, Win32 packaging, PowerShell, and scripting tools. • Develop and maintain imaging and deployment standards, task sequences, and configuration documentation to ensure consistent, secure, and repeatable builds. • Manage Windows updates, feature upgrades, and patching strategies using Windows Update for Business, Intune Update Rings, and Autopatch. • Implement endpoint security controls including BitLocker, Defender for Endpoint, compliance policies, and device hardening baselines. • Troubleshoot imaging, enrollment, driver, application, and post-deployment issues across laptops, desktops, and mobile devices. • Coordinate hardware refresh cycles, device replacement, and asset lifecycle processes. • Maintain configuration standards for drivers, firmware updates, BIOS settings, and device management policies. • Participate in vulnerability remediation, patch management, and security audits.
20%	<p>Second Level Support Engineer (IT Service Desk Escalation)</p> <ul style="list-style-type: none"> • Provide advanced technical support for incidents and service requests escalated from Tier 1 Service Desk. • Perform in-depth troubleshooting, restore services quickly, and prevent recurring issues through root cause analysis and process improvement. • Own escalated tickets end-to-end until resolution • Coordinate with vendors or other IT teams when required. • Conduct root cause analysis for recurring or major incidents. • Identify trends and systemic issues using ticket metrics and monitoring tools. • Develop permanent fixes, workarounds, or knowledge articles to reduce repeat tickets. • Train IT Service Desk staff on common fixes and new technologies
10%	<p>Documentation</p> <ul style="list-style-type: none"> • Create and maintain documentation for workplace and collaboration services policies and procedures, including IT service desk procedures, incident management workflows, and user guidelines. • Build and manage a comprehensive knowledge base that includes FAQs, troubleshooting guides, and solutions for common user issues. • Create instructional materials and documentation for user education on workplace and collaboration tools, ensuring that users have access to relevant resources. • Maintain accurate records of all workplace technology assets, including desktops, laptops, mobile devices, and software licenses.

5%	Research and Innovation <ul style="list-style-type: none"> Stay up-to-date with industry trends, emerging technologies, and best practices. Research and evaluate new tools, frameworks, and technologies for potential adoption. Propose innovative solutions to enhance workplace and collaboration services technologies performance, security, and user experience. 	
5%	Perform other related duties as required	
SPECIAL REQUIREMENTS		
N/A		
To be reviewed and signed by the supervisor and employee:		
EMPLOYEE'S STATEMENT: <ul style="list-style-type: none"> I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR AND RECEIVED A COPY OF THIS DUTY STATEMENT. 		
EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE
SUPERVISOR'S STATEMENT: <ul style="list-style-type: none"> I CERTIFY THIS DUTY STATEMENT REFLECTS CURRENT AND AN ACCURATE DESCRIPTION OF THE ESSENTIAL FUNCTIONS OF THIS POSITION I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE AND PROVIDED THE EMPLOYEE A COPY OF THIS DUTY STATEMENT. 		
SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE	DATE