The State of Idaho

Consolidated Messaging Project

September 24, 2008

Session Purpose

- Overview of project planning
- Implementation strategy
- Operations and maintenance of Consolidated Messaging
- Feedback from session participants

The History

Steering Committee Formed in March 2008

- Directed to study options for consolidated messaging
- Recommend best alternative for the state
- Focused on designing a system that meets or exceeds business needs of all agencies to greatest extent possible
- Plan and oversee project to implement consolidated messaging
- Oversee statewide operations

The History

Steering Committee Efforts

- Early decisions driven by the calendar and budget
  - Select the model to recommend to CIO
  - Select a site to house the new system if we choose an “in-house” model
  - Develop timelines and a work plan to make it happen

The Project Plan

Project Objectives

- State agencies will derive operational and cost efficiencies
- State agencies will realize improved business benefits
- Advance ITRMC's goal to manage technology from a statewide perspective

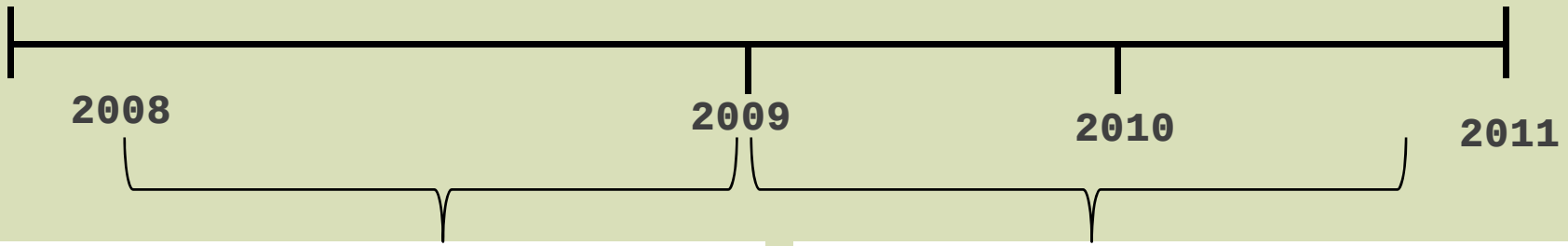
Funding

Fiscal Year	Funding Source	Funding Allocation
2008	Office of the CIO. Dept of Insurance	$130,300
2009	Office of the CIO & Legislative Appropriation	$504,500
2010	Legislative Request	$1.9M
Total		$2,534,800

Agency Costs

- No additional licensing costs in FY09 or FY10
- The project will provide additional resources to assist with implementation – no cost to agencies
- Any agency network upgrades are the responsibility of the agency

The Project Schedule



- **Project Charter is complete - 4/08**
- **Messaging solution is defined - 6/08**
- **Schedule & budget defined - 8/08**
- Enterprise architecture – 8/08
- Operation/Maintenance Plan -09/08
- Rate structure, Governance & Agency Readiness Plan – 9/30
- Initial Operating Capability 12/08

- Project funding is received – 7/09
- Agency rollout begins – 1/2010
- Agency rollout completed–7/31/2011
- Closeout project – 10/31/2011

The Solution

- Primary Decision Criteria
  - Technical risk
  - Organization risk
  - Project management risk
  - Cost
  - Security
  - Functionality
  - Early results

The Decisions

- State-hosted Exchange 2007
- Housed at State Controller
- Managed by the Office of the CIO
- Dell hardware
- Microsoft software
- Active Directory – Designed to be the foundation for future consolidated services

The Solution

What we are NOT doing

- Exchange 2007 Unified Messaging- later phase
  - Voice messaging
  - Speech enabled access
  - Fax delivered to mailbox – unless the agency already has this functionality
  - Consolidated management for voice, email and fax
  - No paging

The Benefits

- A central global address book for all state employees
- Shared calendaring and resource scheduling
- Fewer server licenses and costs
- Smaller agencies being able to access better tools
- Enhanced emergency response communication

The Benefits

- Outlook Anywhere
  - Improved access – No VPN or tunnel required
  - Calendar & Scheduling Attendant
  - Configure and schedule “Out of Office Messaging”
- Self-Service of remote wipe on mobile devices

The Implementation Plan

- Initial Operating Capability (IOC)–Dec 2008
  - Limited budget
  - Contain scope
  - Low risk agencies
- Final Operating Capability (FOC)
  - Obtain funding
  - Transition remaining agencies
  - Non-Exchange agencies/special requirements will be last

IOC Implementation Plan

Agencies participating

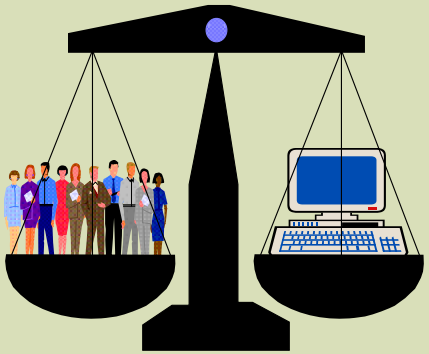
- State Tax Commission
- Dept of Administration
  - 30 agencies
- The Governor's Office
  - Division of Financial Management
  - Department of Human Resources

- Other agencies may transition in FY09 depending on funding and resource constraints

IOC Implementation Plan

- Agency migration-Aug-Dec 2008
  - Kickoff
  - Onsite assessments
    - Agency checklists
  - Develop an individual agency conversion plan
  - Assign resources
  - Data clean-up
  - Testing
  - Agency Readiness Certification
  - Go live

Implementation Plan



Final Operating Capability (FOC)

- Schedule will be determined as follows:
- Agency readiness and costs
- Conversion complexity
  - Non-Exchange environments
  - Integration issues

Final Operating Capability (FOC) Implementation Strategy

Schedule will be determined as follows:

- Agency volunteers
- Licensing costs
- Conversion Complexity
  - Non-Exchange environments
  - Integration issues

The Cost Model

The Cost Model

- IOC Costs
- FY10 costs
- FY11 – Per mailbox fee
- Licensing overview
- Agency responsibilities

Policies and Agency Readiness

E-mail Policies

Business Issue Highlights

- Standard 250 MB Mailbox Size
- Archiving responsibilities
  - Agency responsibility
- Attachment size
  - Limited to 30 MB
- E-mail Address requirements
  - Alias
  - ITRMC Standard naming convention

E-mail Policies

- Personal Folders (PST)
  - Individual Agencies set policy
- Transition of existing email, contacts, calendar
- Public Information Requests
- Public folders
  - Supported, with policy TBD
- Blackberries and Treos
- Restores and back-up

Service Level Agreements

- Roles and responsibilities
- Communication
- Service availability
- Service requests
- Cost

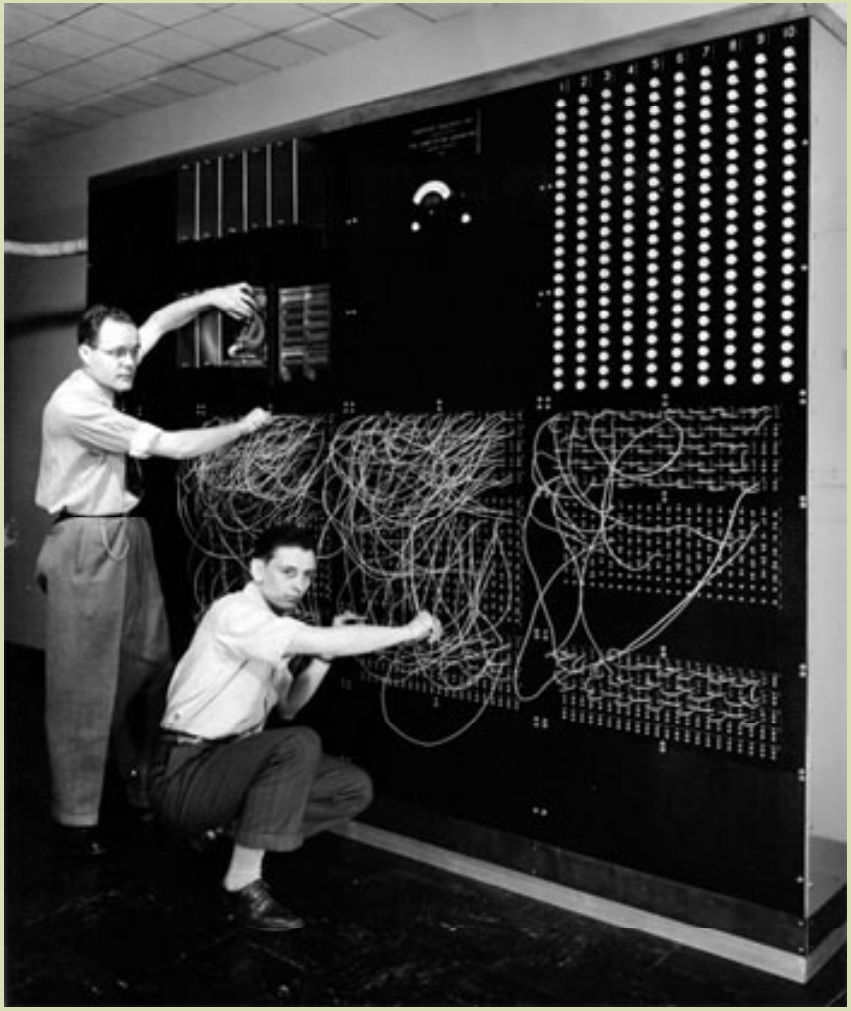
Service Level Agreements

- Based on tiered and levels of service
- Performance measures tracked and reported
- Executive Steering Committee will serve as on-going oversight

Agency Readiness

- Agency readiness assessments
- Resources to assist
- Agency specific migration plan
  - Agency profile
  - Readiness checklist
  - Migration work plan
- SLA negotiation

Operations and Maintenance



Operations

- Larger agencies staffing responsibilities
  - Tier 1 Support Desk remains in your agency
  - Tier 2/3 Resides in the OCIO
    - Additional 4-5 staff to be added to OCIO
- Smaller agencies staffing responsibilities
  - Tier 1/2/3 – Resides in OCIO
- 24/7/365 – On call for system availability
  - 10X5 Live Support

Operations

OCIO Responsibilities

- Incident Management
- Problem Management
- Configuration Management
- Change Management

Operations

- Risk Management
- Capacity Management
- Service Management
  (Including Performance Metrics)
- Communication Management

Communication

Website

http://cio.idaho.gov/messaging

CONSOLIDATED MESSAGING PROJECT

Communications

The Messenger

- “eBlast” Newsletter

MESSENGER IDAHO CONSOLIDATED MESSAGING PROJECT

NEWS FROM THE STATE OF IDAHO'S CONSOLIDATED MESSAGING PROJECT TEAM August 2008

FEEDBACK MEETING SCHEDULED

Date: August 21, 2008
Time: 1:00 p.m. to 4:00 p.m.
Location: Idaho Transportation Department Auditorium
3311 W State Street
Boise, ID

The purpose of this session will be to solicit feedback from the future customers of Consolidated Messaging Services on the planning, policies, operations, cost model, system architecture and design. The project is close to finalizing several critical areas and needs your feedback before final decisions are made. The session will be divided into two sections to accommodate both business and technical participants. Please forward this invitation to anyone in your agency who might be interested in attending.

AGENDA

1:00- 1:15

- Welcome - Greg Zickau, Office of the CIO
- Project Overview - Greg Zickau

Session One 1:15 – 2:30

- Project Objectives & Benefits - Shannon Barnes, Dept. Of Transportation
- Implementation Strategy - Shannon Barnes
- Agency Readiness - Landis Rossi, Dept. of Health and Welfare
- Policies & Service Level Agreements - Landis Rossi
- Cost Model - Steve Wilson - State Tax Commission
- Communications Plan - Chris Brady, Idaho State Historical Society
- Operations Plan - Carla Casper- Office of the CIO

2:30-2:45 Break

Session Two 2:45- 4:00

- System Architecture/Design Overview - Tom Peterman, State Controller's Office
  - Active Directory - Craig Schumacher
  - Exchange 2007 - Fred Woodbridge
  - Network - Mike Mead
  - Storage/Backup - Rocky Bencken
  - Security - Terry Pobst-Martin
- Questions and Audience Feedback - Shannon Barnes

EXECUTIVE STEERING COMMITTEE

Mike Gwartney, Executive Sponsor
Greg Zickau, Office of the CIO
Dan Goicoechea, State Controller's Office
Steve Wilson, Tax Commission
Shannon Barnes, Transportation Department
Landis Rossi, Health & Welfare
Tom Peterman, State Controller's Office
Carla Casper, Office of the CIO
Chris Brady, Idaho Historical Society
Pleas Thompson, CRI Advantage

CRI Advantage, Microsoft, Dell, Otterholt Consulting
Vendor Partners

PROJECT TEAM

Scot Maring
Tammy Shipman
Dana Hanson
Patty Davila
Craig Schumacher
Fred Woodbridge
Mike Mead
Rocky Bencken
Terry Pobst-Martin
Bill Finke
Chris Wilcox
Mike Kalm
Chris Wood
Jeff Klein
Chris McIntire
Steve Tate
Jessica Huggins
Loren Turnbow

LET'S STAY IN TOUCH
CONTACT US: messaging.project@cio.idaho.gov WEBSITE: http://cio.idaho.gov/messaging

Contact us:

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Questions and Feedback?