



State of Montana
Department of Commerce

2012 Agency Biennial IT Report
Fiscal Year 2011-2012

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EXECUTIVE SUMMARY



Commerce is pleased to present this 2012 Agency Biennial Report. It provides a brief overview of the successes, challenges, and on-going projects that were originally defined within the Commerce 2010 Strategic Information Technology Plan. The 2010 Commerce Strategic plan defined not only the major projects that were planned, but further discloses many of the tactical or operational issues facing the Commerce IT community and its leaders.

Many of our on-going objectives are by their nature on-going. These include resource consuming tasks such as workstation or server replacements, training, and maintenance of existing systems. Although this work is on-going and will be into the foreseeable future, it is being performed to keep our basic infrastructure up to date and functioning to meet the requirements of our business community.

Not clearly foreseen during the planning cycle of 2010 are the opportunities that have since become available related to consolidation of our infrastructure equipment, social networking (also referred to as Web 2.0 technologies), and mobile computing. For example, through consolidation or the use of others' facilities, Commerce has reduced the number of our physical servers from 45 in 2010 to (we anticipate) 10 by the end of calendar year 2012. We have taken advantage of social networking in approximately 10 venues to be where are customers are moving to and to communicate with them via the emerging practices (near real time) that they are expecting. Progress has been made in developing task specific mobile applications for our public travel and film users as well as a digital magazine and eLearning content for our constituents thus reducing printing and travel costs. Other highlights are presented by division in the following paragraphs.

The Business Resources Division continues work on the development of a web based application for the distribution of 2010 Census data. The site incorporates new technologies emerging from the Geographical Information System (GIS) segment which will greatly enhance our ability to communicate and share information from the 2010 Census with the many users and partners needing this data. Our Small Business Development Center continues to use the WebCats software subscription services in support of its mission and partner network and has implemented new features that continue to improve efficiency in reporting to the Small Business Administration and the stakeholders. Our Made In Montana Program is presently collaborating with Montana Interactive to upgrade the Made In Montana database and web search applications.

The Community Development Division partnered with other State agencies for the procurement and implementation of a web based grant management system. This implementation is still progressing, and we anticipate that this system will meet the needs of other programs in Commerce as well.

The Housing Division continues to make advancements in the area of records digitization. The Board of Housing implemented a digital records solution, and a solution within the Tenant Based Section 8 area will be implemented in the fall of 2010. Hosting of one of the primary Housing support applications was moved to the vendor's processing facility. The software procurement and implementation has been completed to bring the servicing of our loans in house. Existing loans are currently being migrated to this application.

The Montana Heritage Commission has extended their outreach via implementation of an e-newsletter. Numerous business efficiencies have been implemented, but due to resource constraints, progress on other division objectives has been limited.

The Montana Promotion Division has been pursuing a multi-year project to convert the tourism web site from .asp to .Net – a more current technology platform and tool set. The division monitors new or emerging technologies in use in the tourism and web marketing industry segment. A project to make the tourism web sites available to the mobile device market was completed and is presently undergoing a second revision to keep pace with this rapidly changing market. A management tool for their large library of digital assets is still planned. A project is presently underway to replace the Customer Relations application with a hosted solution from the internet.

We are in the midst of another migration to the newer version of the Microsoft Office productivity suite and Microsoft operating systems.

The agency continues to make progress in the development of our COOP plans and getting them loaded into the State's Enterprise software LDRPS. Our security program continues to make progress as are the Records Management plans and programs within our divisions. These areas will continue to receive our attention in the coming biennium.

Section 1 briefly recounts the goals and objectives from the 2010 Strategic IT Plan, and provides a short description of the accomplishments and status for each. Section 2 briefly recounts the initiatives that were defined in the 2010 IT Plan. Each initiative has a complementary objective; therefore the initiatives do not define new or different items of work, merely those requiring special funding. The initiatives can be further summarized by their funding status: 6 were funded, 0 were not funded, and 0 were partially funded. In total there were 33 objectives defined. These objectives can be further summarized by their status as follows: 16 completed, 2 substantially completed, 12 ongoing, 1 delayed, and 2 canceled.

SECTION 1: AGENCY IT PLAN ACCOMPLISHMENTS – GOALS & OBJECTIVES

Goal Number 1:

IT Goal 1 Provide unique information technology solutions.

Description: Provide and maintain information technology solutions that meet the unique business requirements of the Department's customers and staff.

Benefits: Benefits include more efficient use of limited Department resources enabling staff to better keep pace with increasing demands. The beneficiaries are the various customers of the Department.

State IT Strategic Plan goal/objectives 1-1, 1-2, 1-4, 1-6, 2-4.

Supporting Objective/Action

Objective 1-1 Business Resource Division, Small Business Development Center (BRD/SBDC) – Continue use of WebCATS database and pursue additional capabilities if appropriate.

Accomplishments: This is an on-going objective and this application is currently being actively used.

Status: Complete.

Objective 1-2 Energy Promotion Development Division (EPDD) – Digitize and categorize received information, to include brochures and publications and publish for internal use in a wiki application or similar type of application.

Accomplishments: An analysis of the requirements was performed in comparison to available purchased and cloud based products or subscription services. It was determined that revising records management practices and using existing desktop tools and network files services more efficiently would meet the requirements without further investment.

Status: Complete.

Objective 1-3 Housing Division (HD) – PBS8, TBS8, HOME Scanning/Imaging.

Accomplishments: Have completed setup of new imaging room and have consolidated resources into one location. Imaging of older paper based records is currently underway.

Status: On-going, 70% complete.

Objective 1-4 HD – BOH – Expand Electronic file import in to the current Emphasys systems.

Accomplishments: We have one existing loan Servicer setup for electronic import. This servicer constitutes 50% of all MBOH loans.

Status: On-going, 40% complete.

Objective 1-5 HD – BOH – Expand Auditing functions of LIHTC & MF properties.

Accomplishments: We are evaluating available software and hardware related to the BOH functions to improve the efficiency in the audit process.

Status: On-going.

Objective 1-6 HD – PBS8 – Purchase additional HDS modules.

Accomplishments: Additional modules are being implemented as they released by the vendor and a business need exists for their use. The most recent module is the TRACs Reconciliation Module that corrected an issue that resulted from moving the HDS applications to vendor hosted processing facilities.

Status: On-going.

Objective 1-7 HD – Implement software upgrades to key HD Division applications.

Accomplishments: All upgrades for the Housing Division software applications are implemented once they become available.

Status: Complete.

Objective 1-8 HD – Mortgage Loan Processing.

Accomplishments: The Mortgage Loan Servicing Program has been initiated with the hiring of staff, software has been procured and installed, and the process of building a loan portfolio is underway.

Status: Substantially completed at 90%.

Objective 1-9 Montana Heritage Commission (MHC) – Install network version of Past Perfect software and research best option for software placement/hosting.

Accomplishments: This objective was not completed due to funding that was not available for the software and needed network improvements.

Status: Cancelled.

Objective 1-10 Montana Promotions Division (MPD) – Reel Scout Version Upgrade.

Accomplishments: This upgrade was completed as planned.

Status: Complete.

Objective 1-11 MPD – Ongoing .NET Conversion.

Accomplishments: Phase I is complete. Phase II is underway with development approximately 80% complete. The forms, postcards and photo gallery are in development and integration with SalesForce.Com and the snow reporting are still to be addressed. Completion is expected in September 2012. Phase III is still in the initial phase of requirements definition and is scheduled for completion in the Spring of 2013.

Status: On-going, 50% complete.

Objective 1-12 MPD – Upgrade Webtrends Software.

Accomplishments: Completed as planned.

Status: Complete.

Objective 1-13 MPD – Digital Asset Management System.

Accomplishments: The project to find and procure a software product or service has not been started.

Status: Delayed.

Objective 1-14 MPD – Replace or upgrade Customer Relationship Management (CRM) application.

Accomplishments: An alternative solution has been selected, and implementation began June 30, 2012 with implementation scheduled for December 1, 2012.

Status: On-going, 20% complete.

Goal Number 2:

IT Goal 2 Increase electronic government services.

Description: The Department will enhance electronic government services to better serve our customers and realize efficiencies.

Benefits: Enhanced web services allow the agency to deliver its services more efficiently and greatly improve agency efficiency. The beneficiaries include the citizens of the State of Montana, Department staff, and Department customers.

State IT Strategic Plan goal/objectives 1-4, 1-6, 2-3, 2-5.

Supporting Objective/Action

Objective 2-1 Business Resource Division, Census and Economic Information Center (BRD/CEIC) – Economic/Demographic/Housing Online Database and Interactive Internet Mapping.

Accomplishments: CEIC has completed the design and implementation of all the software necessary to produce the interactive website. The SQL database is connected to Visual Studio and the structure determined. The interactive mapping function is live on the current site.

Status: On-going, 60% complete.

Objective 2-2 BRD/SDBC/MTIP – Webinars or Streaming Videos to deliver Montana Technology Partnership (MTIP) training services.

Accomplishments: This project consists of the production of a series of six webinars designed to increase the capacity of Montana's SBDC business advisors to assist with the commercialization needs of technology companies. Three webinars have been completed and released to three SBDC business advisors. The remaining three webinars will be deployed by October 1, 2012. Three more business advisors will be trained in 2013 and the remaining advisors in 2014. Revisions and updates of the webinars will be implemented as needed through 2015.

Status: On-going, 50% complete.

Objective 2-3 HD – BOH – Evaluate Montana Board of Housing (MBOH) Website.

Accomplishments: MBOH staff is currently still evaluating the MBOH website. Items under evaluation include content management, flow of the website and accessibility across multiple formats and devices.

Status: On-going.

Objective 2-4 Community Development Division (CDD) – Online Version of Uniform Application Form for Montana Public Facilities Projects.

Accomplishments: Commerce has partnered with FWP, AG, and DNRC to procure and implement a grants management system that is web enabled and hosted by the vendor. DNRC has taken the lead in implementing the Uniform Application Form for Montana Public Facilities Projects. Commerce is still in progress to implement their portion/usage of this form.

Status: On-going, 65% complete.

Objective 2-5 MPD – Tourism Client Interface.

Accomplishments: This may also be referred to as the Phase III, of the .Net conversion. Preparation of the requirements is currently underway.

Status: Delayed, 10% complete.

Objective 2-6 MPD – Emerging Technologies.

Accomplishments: MPD has developed and deployed consumer facing applications for the iPad, iPhone and Android native applications. MPD has also developed and deployed mobile friendly and/or responsive versions of visitmt.com, getlostmt.com and mtdinotrail.org.

Status: On-going.

Objective 2-7 Montana Department of Commerce (MDOC) – Continue Web 2.0 Technologies Evaluation and Use.

Accomplishments: Internal processes for the approving, managing and monitoring the use of Web 2.0 technologies have been established and approved by DOA/SITSD. As appropriate, Web 2.0 use instances are being deployed.

Status: Complete and on-going.

Goal Number 3:

IT Goal 3 Secure Department IT resources.

Description: Secure Department hardware, software, and data to prevent unauthorized access, alteration, or loss and ensure business continuity.

Benefits: Secure information systems benefit everyone because secure systems ensure business continuity in the event of a disaster or attack.

State IT Strategic Plan goal/objectives 1-4, 2-3, 2-6, 4-1.

Objective 3-1 Board of Investments (BOI) – Disaster and Recovery Plan.

Accomplishments: A D/R workstation has been purchased and configured to access BOI's files on the network and for Bloomberg trading. It is located in the Dept. of Commerce server room. 100%

Status: Complete.

Objective 3-2 MDOC – Continued COOP & Disaster Recovery Planning.

Accomplishments: Objectives in the development of the COOP plan have been completed as planned. Disaster recovery planning has resulted in significant consolidation of resources and have moved some information technology processing resources to more resilient and better protected facilities. Both COOP

and D/R are continually evolving objectives, and we have completed the objectives planned in 2010. 100%

Status: Complete & on-going.

Objective 3-3 MDOC – Continue Department wide Records Management Program Development.

Accomplishments: Agency and division/program level records management programs are in place. Work is still in progress in managing our electronic records.

Status: Substantially complete.

Goal Number 4:

IT Goal 4-1 Staff development and support tools.

Description: Provided staff the skills and tools necessary to support the business needs of our customers both inside and outside the Department.

Benefits: Improving the technical expertise of agency staff allows the agency to more effectively and efficiently serve our customers. The beneficiaries include the citizens of Montana, Department staff, and Department customers.

State IT Strategic Plan goal/objectives 1-7, 2-1, 2-2, 2-4.

Supporting Objective/Action

Objective 4-1 BOI – File and Print Services Migration.

Accomplishments: With SITSD assistance, BOI migrated from the Novell environment to a Microsoft Windows environment.

Status: Complete.

Objective 4-2 BOI – File and Print (F&P) Server Hosting.

Accomplishments: BOI has entered into an agreement with SITSD to host their file and print server at the SITSD Data Center. Migration of the files has been completed. 100%.

Status: Completed.

Objective 4-3 MDOC – Continue & Enhance Tele-Conferencing Capabilities.

Accomplishments: Commerce has continued to use the Citrix GoToMeeting facilities to reduce the amount of travel for our employees as well as the public. We have upgraded to a more functional and less expensive voice conferencing service and have recently begun using the limited video conferencing offered by the Citrix vendor.

Status: Complete.

Objective 4-4 Management Services Division (MSD) – Additional Document Imaging.

Accomplishments: We had planned to also digitally image our invoices, but upon further analysis it was determined not to be cost effective.

Status: Cancelled.

Objective 4-5 MSD – Migrate to Microsoft based Infra-structure.

Accomplishments: Commerce successfully migrated from a Novell based infrastructure to a Microsoft based infrastructure. This included file and print services, and MS product patch management. We are in the process of implementing SCCM, which provide additional MS based services for hardware and software asset management, workstation deployment, and software deployment. Novell services have been entirely removed.

Status: On-going, 70% complete.

Objective 4-6 MSD – WINDOWS 7 Migration.

Accomplishments: We have been deploying Windows 7 operating systems in our new workstations and laptops that have been replaced over the last 18 months. We intend to being upgrading existing machines this fall, to be completed by April 2013, well ahead of the date when the XP operating system will no longer be patched by Microsoft (April 2014).

Status: On-going, 30% complete.

Objective 4-7 MSD – Continue & Enhance Teleworker Support.

Accomplishments: We have continued to make the State's teleworker site available to our employees. We have eliminated all employee based VPN access in favor of the teleworker site.

Status: Complete.

Objective 4-8 MDOC – Server Replacements.

Accomplishments: Server replacements were completed as planned. We were able to replace less servers because of the progress made in consolidating resources within the agency, and moving to hosted facilities elsewhere.

Status: Complete.

Objective 4-9 MDOC – Workstation Replacements.

Accomplishments: Workstation replacements have been completed as planned, as well as moving the replacement cycle from 4 year to 5 years. Laptops are not replaced until they fail to meet the business needs.

Status: Complete.

Objective 4-10 MSD – Common use software maintenance.

Accomplishments: Our common use software (for example the Microsoft Office Suite of products) is patched on a timely basis and support is retained through the Microsoft Enterprise License Agreements. Support is maintained on all other software applications and products as well.

Status: Complete.

Objective 4-11 MSD – IT Workforce Development.

Accomplishments: Training is requested and provided to staff as needs are identified and training becomes available. Typically this relates to new versions of software that are being released, or ongoing topics that are important to Commerce such as security and web related technologies.

Status: Complete & ongoing.

SECTION 2: IT INITIATIVES STATUS UPDATES

Initiative 1 ITO 1-5 HD – BOH – Expand Auditing functions of LHITC & MF properties.

Description: Continue to seek and implement additional efficiencies in the auditing of LIHTC & MF properties. This objective is to continue the process of evaluating available modules related to the BOH functions from the existing Emphasys vendor to improve on the efficiency in the audit process. Those that are evaluated to be beneficial and funding is made available for, will be pursued for implementation.

EPP Number: 7410

Status: On-going.

Funding: Funded.

Initiative 2 ITO 1-7 HD – Implement software upgrades to key HD Division applications.

Description: The Division's (BOH, PBS8, TBS8, HOME) primary software applications (Emphasys, HDS and HAPPY) will be updated as vendor provides new software releases or upgrades to meet the requirements of our business partners and regulations within our industry segments.

EPP Number: 7410

Status: On-going.

Funding: Funded.

Initiative 3 ITO 1-8 HD – Mortgage Loan Processing.

Description: This initiative brings the processing/servicing of Mortgage Loans into the internal resources of the Housing Division instead of relying upon outside loan servicing providers.

EPP Number:

Status: Substantially Completed.

Funding: Funded.

Initiative 4 ITO 1-14 MPD – Replace or upgrade CRM application.

Description: Pending the outcome of an IT audit/study being performed in the first quarter of 2010, MPD will replace or upgrade our current Siebel CRM system.

EPP Number: 5210

Status: On-going.

Funding: Funded.

Initiative 5 ITO 2-5 MPD – Tourism Client Interface.

Description: The MPD plans to develop a secure Web based (thin client) application to allow our businesses and property managers to update portions of their record on vistmt.com. The application will directly access our Oracle database that is used to build the dynamic pages of our Website.

EPP Number: 5210

Status: Delayed

Funding: Funded.

Initiative 6 ITO 4-8 MDOC – Server Replacements.

Description: In accordance with state recommended best practices, MDOC will adhere to a standard replacement cycle of 5 years on servers. Our replacement schedule is based on the existing hardware, but we will evaluate opportunities for consolidation to increase our efficiency prior to performing any replacements..

EPP Number: 7411/5211/8111

Status: Completed.

Funding: Funded.

SECTION 3: ADDITIONAL INFORMATION - OPTIONAL

None at this time.