

State of Montana Information Technology Managers Advisory Council

Council Business Meeting January 8, 2014 - 10:00 – 12:00 Room 152 – State Capitol

Welcome and Introductions (10:00 - 10:05)

- Michael Sweeney, Chair
ACTION ITEM: Approval of December minutes

Business (10:05 – 11:50)

- WSCA – Montana eMarket Center – Steve Haynes (10 minutes)
- Electronic Records Management Update (5 minutes)
 - RFI – Miranda Keaster
 - HJ2 Workgroup – Tammy LaVigne
- LGIT Update – Joe Frohlich (5 minutes)
- Network Managers Group Status Update – Jerry Marks (5 minutes)
- Email Archive Documentation – Jerry Marks (10 minutes)
- Mobile Device Strategy– Lynne Pizzini (10 minutes)
 - Draft document posted for review
- **BREAK – 10 MINUTES**
- Strategic Planning Process – Kyle Hilmer (10 minutes)
- Microsoft EA Renewal Process Update – Maris Cundith (10 minutes)
- ITMC Work Plan – Michael Sweeney (10 minutes)
- Change Management – Pete Wiseman (10 minutes)

Standing Agenda Items (11:40 – 11:45)

- Posted Reports

Adjournment (11:45-12:00)

- Next Meeting – February 5, room 137
- Member Forum
- Public Comment
- Adjourn

Notice: The Department of Administration will make reasonable accommodations for persons with disabilities who wish to participate in the ITMC public meetings or need an alternative accessible format of this notice. If you require an accommodation, contact the Department of Administration no later than six business days prior to the meeting of interest, to advise us of the nature of the accommodation that you need. Please contact Carol Schopfer, 406-444-4510 or cschopfer@mt.gov.

MONTANA EMARKETCENTER

The eMarketCenter is an online purchasing portal that provides users with the ability to purchase goods directly from contracted vendors. Access to the purchasing system is available through following link:

Montana eMarketCenter

If you have any questions pertaining to the eMarketCenter, please contact [Jodi Gollehon](#) at (406) 444-7210.

TERM CONTRACTS

The following is a list of Term Contracts that currently are or will be available on the Montana eMarketCenter and their respective dates of enablement. All other Term Contracts are available for purchasing as outlined in each individual contract. Please see our Term Contracts [webpage](#) for additional information.

CONTRACTOR	CATEGORY	DATE OF ENABLEMENT
OfficeMax	Office Supplies	07/01/2013
Staples	Office Supplies	07/01/2013
Dell	Computer Equipment	01/2014*
Hewlett Packard	Computer Equipment	01/2014*
IBM	Computer Equipment	01/2014*
Kyocera	Computer Equipment	01/2014*
Lexmark	Computer Equipment	01/2014*
NetApp	Computer Equipment	01/2014*
Xerox	Computer Equipment	01/2014*
Ace (University use only)	Computer Equipment	01/2014*

*Anticipated date of enablement

Purchases via eMC are with P-Card only.



WCSA/NASPO

SIGN IN

Please enter the login credentials in the fields below to sign in to the application.
Password is case-sensitive.

Are you an existing user?

User
Name

Are you a new user?

This application is accessible only to registered users.

With your account you will:

Password

Forgot your Password?

[SIGN IN](#)

- Have access to all negotiated contracts
- Be able to shop from multiple suppliers at discounted price
- Be able to search and find products



[Create a WSCA/NASPO eMarketCenter Account](#)

Current WSCA-NASPO Contracts:

Hi-lighted = Contracts the State has PAs (Participating Addenda) in place.

- **Auto Parts - Light Duty (WSCA-CA)**
- **Automatic External Defibrillator/AED (NASPO-OK)**
- **Background Screening Services (WSCA-UT)**
- Best Value Contracting Process (NASPO-AK)
- BioBased (remanufactured) Toner Cartridges (NASPO-SD)
- **Body Armor (WSCA-CO)**
- **Breast Pumps (WSCA-WA)**
- **Computer Equipment, Peripherals & Related Services (WSCA/NASPO-MN) ** Exclusive**
- Contract Compliance & Cost Recovery Services (WSCA-UT)
- **Copiers (multifunction) & Related Software (WSCA-NV)**
- **Data Communications Equipment and Associated OEM Maintenance & Training (WSCA-UT)**
- Dental Supplies (NASPO-OK)
- Digital Print & Quick Copy Contract (WSCA-UT)
- Discounted Airfare (OR)
- Disposable Culinary Items (MCPA/NASPO-NV)
- **Drug Testing Kits (NASPO-AR)**
- **Electronic Monitoring (WA)**
- Electronic Monitoring Equipment and GPS Services - old (WSCA-WA)
- eProcurement Solutions (WSCA-UT)
- **Facilities MRO (WSCA-NV)**
- Fire Protection Services and Security & Protection Services (NV)
- Ground Maintenance Equipment (NASPO-VA)
- Hazardous Incident Response Equipment/HIRE (NASPO-NY)

- HIV, Saliva Alcohol and Hepatitis C Testing Kits (NASPO-AR)
- Incontinent Briefs (NASPO-AR)
- Inmate Kiosks (MCPA/NASPO-NV)
- Lab Equipment and Supplies (NASPO/WSCA-ID)
- Learning Technology Initiative (WSCA-NASPO ME)
- Legal Subscription Services (NASPO-MN)
- Mailing Equipment, Supplies & Maintenance (WSCA/NASPO-AZ)
- Managed Print Services (WSCA-NM)
- Natural Gas Vehicles (NASPO-OK)
- Office Furniture (WSCA-UT)
- Office Supplies (WSCA-OR)
- Payment (Electronic) Acceptance Services - EPAY (WSCA-CA)
- Police Radar, Lidar, Parts & Equipment (WSCA/WA)
- Public Cloud Hosting Services (WSCA-UT)
- Public Safety Communication Equipment - Radios (WSCA-WA)
- Purchase Card Services (WSCA-CA)
- Small Hand & Power Tools - and accessories (NASPO-OK)
- Small Package Delivery Service (WSCA-UT)
- Software VAR (NASPO-AZ) * Non-Exclusive

En Pointe Technologies Sales, Inc.
Insight Public Sector
SHI International Group

- Telephone Based Interpreter Services (WSCA-WA)
- Tires, Tubes and Services (WSCA-UT)
- Travel - Discounted Airfare (OR)
- Travel - Nationwide Booking Tool (OR)
- Travel - Nationwide Lodging (OR)
- Travel - Nationwide Vehicle Rental (OR)
- Vehicle Lifts and Related Garage Equipment (WSCA-WA)
- Walk-In Building Supplies (WSCA-UT)
- WIC Baby Food (NASPO-ME)
- WIC Baby Food (NASPO-OH)
- WIC Infant (dry) Cereal (NASPO-OH)
- WIC Infant Formula (WSCA-WA)
- Wireless Communication & Equipment (WSCA-NV)
- Wireless Management & Contract Compliance Services (WSCA-UT)

Draft Mobile Device Strategy

Submitted by Wes Old Coyote
Last Modified: Nov 26, 2013

Document Number: Draft version 0.6

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DRAFT

1. INTRODUCTION

The vast majority of organizations have found success in the use of mobile devices for work purposes. The most obvious benefits are attributed to the end user, with increased employee productivity, satisfaction, and creativity, which leads to a more pleasant and efficient workplace.

However, these benefits have a cost. Communications and support costs are increased due to new devices, operating systems and applications implemented within these environments. The State of Montana can minimize the negative impacts of mobile devices with a collaborative strategy.

Mobility is not solely about deploying devices to employees, but about understanding how mobile technologies are impacting all facets of government and business.

Organizations with a formal mobile device strategy have fewer problems with their mobile devices. A mobile strategy is particularly useful for keeping track of mobile assets, ensuring secure data transmission and optimizing telecommunication expenses.



Figure 1: Separation of Data on a Mobile Device, NIST SP 800-164 (Draft)

2. PURPOSE, GOALS AND OBJECTIVES FOR MOBILE DEVICE STRATEGY

2.1 Strategic Purpose

Workforce Enablement — to support increased productivity, increased customer satisfaction, better decision making and improved collaboration. Consumerization of IT (the trend where new technologies enter the consumer market first and are adopted secondly by the business and defense markets¹) is directly impacting the State's IT and communications environment and is expected to increase in the future.

A well thought-out strategy will help the State of Montana address relevant internal and external drivers (Demand, Social Media, Technical Support, Business Needs). Smartphones and tablets are quickly becoming the technology of choice for consumers and enterprise employees alike.

2.2 Goals and Objectives

GOAL 1

Optimize current and future investments in mobile devices, infrastructure and support.

Objectives

Conduct inventory of current mobile device population.

Optimize existing and future services provided by the vendors. Collaborative approach with vendors as a State, (not multiple agencies) by identifying key groups and consolidate strategies (for example, Public Safety, General Government, Health, etc...) as communities of interest.

Optimize the use of shared infrastructure where appropriate in a federated structure to ensure availability of critical and sensitive agency services.

GOAL 2

Develop enterprise tool(s) for more efficient mobile device deployment and management.

Objectives

Enhance MDM efforts already deployed or implemented.

¹ Ugayan Banerjee - <https://setandbma.wordpress.com/2012/03/30/consumerization-of-it/>

Implement automation of procurement and deployment with vendor offerings.

Develop Federated model to support all agency missions and/or communities of interest regardless of users and devices supported.

Enhance Business Continuity, Information Sharing and Process Improvement.

GOAL 3

Develop enterprise policies to clearly define standards, limitations and use.

Objectives

Inventory existing policies and standards.

Develop a strategy that maintains usability without compromising sensitive data.

Develop policies for use and reimbursement as required.

IT Strategic Planning Timetable

January 8, 2014

January 22, 2014	SITSD publishes the latest draft of the state-wide strategic IT plan SITSD distributes agency plan instructions and Template.
March 1, 2014	SITSD submits the 2014 State Strategic Plan to the Governor and Legislative Finance Committee
March 15, 2014	SITSD publishes Agency IT Supplement documents and instructions.
April 1, 2014	2012 State Strategic Plan for IT published.
April 16, 2014	Agency IT Plans due to SITSD.
April – May	SITSD reviews Agency IT Plans, obtains clarifications, and requests changes
May 7, 2014	Agency IT Supplements due to SITSD.
May 31, 2014	SITSD recommendation to the CIO for approval of Agency IT Plans. (This is the deadline; each recommendation is due no later than 60 days after receipt of an Agency IT Plan.)
June 30, 2014	Final day for SITSD to approve Agency IT Plans (pending receipt of IT Initiative Supplements).
June - August	Agency IT Supplements reviewed by SITSD in coordination with OBPP. IT Supplements will be appended to the Agency IT Plan upon approval by OBPP.
November 15, 2014	OBPP and SITSD submit a summary of major new IT projects to Governor's Office, and for legislators' consideration.

Microsoft Enterprise Agreement Renewal

January 8, 2014



State Information Technology Services Division



Renewal Goal & Objectives

Goal

- Maximize the value of the State's Enterprise Agreement.

Objectives

- Inform the Enterprise of the full value of licensing entitlements and benefits covered in the Enterprise Agreement.
- Develop and implement a renewal process.

Enterprise Renewal Teams

State IT Managers Microsoft Enterprise Agreement Renewal Team

- Goal: advise and inform the State Chief Information Officer of agency Microsoft issues and concerns.

Microsoft Enrollment Coordinators Team

- Goal: ensure all agencies are fully aware of, and can manage, specific license entitlements and benefits contained in the Enterprise Agreement.



Communication Plan

Microsoft Enterprise Agreement Renewal site on mt.gov.

- <http://itsd.mt.gov/about/samoffice/microsoftrenewal.mcpx>

Site currently includes

- Draft of the Microsoft Enterprise Agreement Renewal Management Plan
- List of Enterprise Agreement renewal teams
- List of agencies with Microsoft Enrollments
- Cost of current Enterprise Agreement
- Enterprise Agreement Benefits
- Historical Background of Enterprise Agreement



Enterprise Renewal Team Meeting Initial Schedules

- State IT Managers Microsoft Enterprise Agreement Renewal Team
 - First meeting to be scheduled this month.
- Microsoft Enrollment Coordinators Team
 - First two meetings this month and anticipated bi-monthly meetings through May.
 - First deliverable will be inventory results of each agency's Microsoft software products.



Questions, Issues, Comments?

THANK YOU FOR YOUR TIME
TODAY



State Information Technology Services Division



Microsoft Enterprise Agreement Enrollment Coordinator Team
Team Member Role and Responsibilities
January 8, 2014

GOAL

Develop a statewide team to ensure maximization of all the benefits under the Microsoft (MS) Enterprise Agreement (EA) and stay informed of changes in MS licensing.

OBJECTIVES

Have one person appointed from each agency to serve on the team to:

- Bring awareness to their respective agency of all benefits under the MS EA;
- Perform license management for their agency using MS's Volume Licensing Service Center (VLSC); and
- Participate and represent their agency in the annual MS True-Up process.

MS EA Enrollment Coordinators Team Roles & Responsibilities

- Prioritize what needs to be addressed and determine annual meeting schedule for the Team.
- Attend monthly meetings (or timeline as established by Team).
- Stay informed on changes of MS licensing through sessions with MS and/or Dell.
- Participate in the review of, making recommendations and documentation of the MS EA renewal process and the annual True-Up Process.
- Participate in MS or Dell (Reseller) sessions as planned and determined by Team.
- Participate in developing process for educating users on MS license entitlements and usage, and employee benefits.
- Gain knowledge of managing entitlements through the MS Volume Licensing Service Center website.

Agency Specific Roles & Responsibilities

- Serve as MS point of contact.
- Educate users on MS license entitlements and usage, and employee benefits.
- Manage agency licenses using the MS VLSC.
- Manage the MS EA inventory process upon renewal of the EA.
- Manage annual True-Up Process.

Resources

Resource staff time roughly estimated anywhere from 4-8 hours per month the first few months.

Microsoft Enterprise Agreement Enrollment Coordinators Team

The overall goal of the Microsoft Enterprise Agreement Enrollment Coordinators Team is to ensure all State agencies are fully aware of, and can manage, specific license entitlements and benefits contained in the Enterprise Agreement.

- **Objective:** Members will participate and represent their agencies in the Enterprise Agreement renewal and annual true-up processes.

- **Objective:** Members will perform Microsoft license management using Microsoft’s Volume License Service Center and agency purchasing records.
- **Objective:** Members will develop a communication plan to share information with the enterprise.

AGENCY	NAME	ROLE	RESPONSIBILITY
SITSD SAM Program Office	Maris Cundith	Renewal Process Manager	Provides management of renewal from beginning to end. Duties include establishing the desired make-up of renewal teams, locating and consolidating information needed to conduct the renewal, provide contract details relating to the renewal including license terms and conditions, license metrics, reporting requirements, contract terms, and other relevant information. Serves as primary contact point with Microsoft. Schedules and facilitates meetings with teams and others as necessary.
SAM Program Office	Sean Edgar	Microsoft License and Entitlement Coordinator	Advise and inform members on license quantities, entitlements, compliance, etc. Serve as member of the team until renewal is complete then serve as main contact for team after renewal.
SAM Program Office	Dale Stout	Microsoft Contract Coordinator	Advise and inform members on contract options, costs, benefits, etc. Serve as member of the team during and after renewal.
SAM Program Office	Deon Olson	Renewal Support	Provide support to team as needed. Serve as member of the team during and after renewal.
AGR	John Ortman	Agency Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.
CORR	Kim Tuttle	Agency Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.
DOA	Michael Sweeney	Agency Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.
DOC	Larry Krause	Agency Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.
DOJ	Judy Little	Agency Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.

			true-up process.
DOR	Peder Cannon	Agency Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.
DPHHS	Dave Johnson	Agency Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.
FWP	Andi Johnson	Agency Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.
JUD	Tim Kosena	Branch Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.
LEG	Josh Gillespie	Branch Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.
MDT	John Levick	Agency Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.
STF	Aaron Mook	Agency Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.
SAO	Glynis Gibson	Agency Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.
SOS	Brad Flath	Agency Enrollment Coordinator	Serve as agency Microsoft point of contact. Educate Users on Microsoft license entitlements and usage, and employee benefits. Manage agency licenses using the Microsoft Volume License Service Center. Manage agency annual Microsoft true-up process.

Please contact Maris Cundith at mcundith@mt.gov or 444-3361 with any questions or concerns.

2014 ITMC Work Plan

BACKGROUND

ITMC Purpose:

“To advise the DoA on IT issues in state government and improve management of IT resources.”

Source: Statutory Overview, published May 2013 <http://itsd.mt.gov/content/policy/councils/itmc/docs/StatutoryOverview>

A general sentiment exists that ITMC has not been effective at fulfilling its purpose of addressing enterprise-level IT concerns. This may explain the limited participation and lack of engagement by ITMC members and others in the IT community. In addition, ITMC has struggled with chartering working groups with purposeful actions. The development and adoption of a Work Plan is seen as key to helping ITMC overcome these challenges and achieve its purpose.

WORK PLAN

The purpose of this work plan is to identify the high-level priorities of the ITMC and the actions needed to support those priorities. This work plan will:

1. Support the State CIO and the Statewide Strategic IT Plan.
2. Focus ITMC efforts on priorities that have been identified as important.
3. Identify tangible actions and outcomes for ITMC to work towards achieving.

These priorities are focused on how we work together or are a major common concern and are not necessarily technology or operational priorities per se. The actions will help drive the ITMC working groups and efforts to be focused on the “right” work. Well defined actions are also measurable in that we can look back and say “Did we accomplish what we said we were going to do?”

PRIORITIES AND ACTIONS

1. **GOVERNANCE PRIORITY** – While respecting the federated structure of IT operations in state government, we also recognize the value and necessity of working together as an enterprise. We also understand that we also need to be able to measure our performance as an enterprise and tell the story of all IT in the State of MT.

GOVERNANCE ACTIONS:

- **Make the ITMC Work Plan a duty of the ITMC Executive Board with refreshing of the Work Plan yearly.** A plan that is revised annually to reflect the changing makeup and priorities of the ITMC Executive Board and the IT environment of the State ensures that ITMC doesn't fall back to irrelevancy or apathy.

- **Revamp the ITPR process so that it is driven to develop a clearinghouse of what agencies are doing, buying and when.** This also ties into the agency IT Strat Plans (what we're now calling our operational or tactical plans).
 - **Develop an enterprise IT Project Inventory/Portfolio that includes all projects.** This would be internal and NOT an LFC reporting mechanism, although it could feed such. We need something operational and not constrained by political influence. Done correctly, the open exchange of information will help foster accountability and cooperation.
 - **Inventory and charter all "enterprise working groups"** such as the ISMG, NMG, and any others so everyone knows what they are supposed to do (purpose), how they operate (membership, meetings, how decisions are made), reporting, etc.
2. **SHARED SERVICES PRIORITY** – There are areas where we can and should work together to develop shared services. Even though this may result in unequal cost allocations we resolve to work through them in a manner that benefits the enterprise.

SHARED SERVICES ACTIONS:

- **Develop an IT Services Governance Group** – This group will assist SITSD in vetting and developing all SITSD enterprise services and investments. They will also participate in the shutdown and decommissioning of enterprise services that are no longer needed or are forecast to decline.
 - **Identify Services that are candidates for shared services** – This effort will identify, inventory and prioritize services provided by either SITSD or agencies that are candidates to become shared or enterprise services.
3. **SECURITY PRIORITY** – We've heard over and over and over that a lack of resources (mainly people with the expertise needed) is hampering our ability to develop agency level security programs, policies, processes and tools at a pace in compliance with the State's adoption of the NIST standards. We need to work together to find the resources or lobby our respective leaderships for the needed resources. 20 voices saying the same thing is much more effective than one.

SECURITY ACTIONS:

- **Create a Statewide Security Coalition or Task Force tasked with addressing the number one security concern: Lack of resources.** Include all branches (Leg, Judicial and Exec.) and locals and universities where possible. This group will be responsible for obtaining the funding/resources necessary to meet the requirements of MCA 2-155...security program statute and perhaps other statutory or operational requirements of non-exec branch participants. We're only secure as our weakest link.

SITSD's Change Management Program

Presented by
Pete Wiseman



-----*State Information Technology Services Division*-----



Agenda

- Change Management Program Overview
- Change Request Form
- Change Advisory Board
- Forward Schedule of Change & Change Management Calendar
- \$64,000 Question – When Should You Submit a Change Request?
- Recommended Next Steps



Change Management Program Overview

- SITSD's Program is more than 10 years old and has improved greatly over the years
(Always looking for ways to improve)
- Promote Awareness – Keep People Informed
- Minimize Risk



Change Request Form

- The Change Request form asks for a description (title), change type, category, tech responsible for the work, approvers, impact, urgency, risk level, implementation date/time, risk details, technical details, test plan, backout plan, customer impact, customer communications, and who should be notified

The screenshot displays the 'Request for Change' form within the 'SERVICE DESK ONLINE ...it's all about service.' interface. The form is titled 'Request for Change' and is categorized under 'Selected Request Type'. It includes a 'General Info' section with fields for Change Description, Change Type, Category, Requested by, Assigned to, Supervisor Approver, Bureau Chief Approver, CI Involved, Impact, Urgency, Change Risk (Risk Calculator), Implementation Start Date/Time, and Implementation End Date/Time. Below this is a 'Questions' section with seven numbered items: 1) Risk Details, 2) Technical Details, 3) Test Plan, 4) Backout Plan, 5) Customer Impact, 6) Customer Communication Needed? (Yes/No), and 7) Who should be notified of the change. The form also features an 'Add Files to the request' section with an 'Add' button and a 'Ready selected files' area. A 'Close Request' button is located at the bottom right.

Change Advisory Board (CAB)

- The CAB is currently made up of SITSD managers and is responsible for reviewing (assessing risk, scheduling conflicts, customer impact, and post implementation review) and approving Change Requests. **Customers are encouraged to participate.**
- CAB meets online Monday, Wednesday, and Friday at 11:00 (meeting information is available on the SITSD Service Desk webpage and at the end of this presentation).



Forward Schedule of Change & Change Management Calendar

- The Forward Schedule of Change is available on the SITSD Service Desk webpage. It contains a list of scheduled changes (category, type, date/time, title, customer impact and affected users). It is updated three times a week.
- The Change Management Calendar is located on the Change Management webpage and contains the dates of important agency events. This calendar helps with the scheduling of changes.



The \$64,000 Question – When Should You Submit a Change Notification

- Any Change that has a Customer Impact
- Any Change you want a record of making
- When in doubt, submit a Change Notification



Recommended Next Steps

- ITMC take “Enterprise” Change Management up as an Action Item
- Develop a process for submitting Change Notifications (who, what, when), Where to post Change Notifications (include in the existing Forward Schedule of Change?, Add to the CAB meeting agenda? Shine a light into the sky, like the Bat Signal)
- What steps can we take to ensure awareness and minimize risk?



Reference Material

- Change Request Form
- http://servicedesk.mt.gov/scripts/isafcgi.dll/pobweb/pobweb=7344a/EU_HDS.WCASEU10.5.103.17
- Risk Calculator
- <http://mainframe.mt.gov/riskcalc.html>
- Forward Schedule of Change
- <https://mine.mt.gov/content/it/servicedesk/fsc.xls>
- Change Management Calendar
- <https://app.mt.gov/statecals/html/event/ChM/>
- CAB Meeting Lync Info
- <https://RTCHelena.mt.gov/meet/pwiseman/2MCW5ZKT>
- Audio via Lync or 444-4647 Conference ID: 500238



Email Archive

New SITSD Service Offering

What is Email Archive?

Enabling a personal archive (also called an on-premises archive) or cloud-based archive for an existing mailbox helps you regain control of your organization's messaging data by eliminating the need for personal store (.pst) files and allowing you to meet your organization's message retention and eDiscovery requirements.

The use of .pst files to manage messaging data can result in the following issues:

- **Unmanaged files**

Generally, .pst files are created by users and reside on their computers or network shares. They aren't managed by your organization. As a result, users can create several .pst files containing the same or different messages and store them in different locations, with no organizational control.

- **Increased discovery costs**

Lawsuits and some business or regulatory requirements sometimes result in discovery requests. Locating messaging data that resides in .pst files on users' computers can be a costly manual effort. Because tracking unmanaged .pst files can be difficult, .pst data may be undiscoverable in many cases. This could possibly expose your organization to legal and financial risks.

- **Inability to apply messaging retention policies**

Messaging retention policies can't be applied to messages located in .pst files. As a result, depending on business or applicable regulations, your organization may not be in compliance.

- **Risk of data theft**

Messaging data stored in .pst files is vulnerable to data theft. For example, .pst files are often stored in portable devices such as laptops, removable hard drives, and portable media such as USB drives, CDs, and DVDs.

- **Fragmented view of messaging data**

Users who store information in .pst files don't get a uniform view of their data. Messages stored in .pst files are generally available only on the computer where the .pst file resides. As a result, if users access their mailboxes using Outlook Web App or Outlook on another computer, the messages stored in their .pst files are inaccessible.

Why take advantage of Email Archive?

- Help meet long-term retention requirements
 - Cloud-based archives allow you to store large quantities of messaging data off-site in secure and controlled datacenters.
 - Exchange Online Archiving helps your organization meet regulatory compliance or business requirements for long-term retention of e-mail. Using archive policies, messages are moved from on-premises mailboxes to the cloud-based archives. The same retention policies applied to on-premises mailboxes can be enforced on cloud-based archives.
- Help meet eDiscovery and litigation hold requirements.
 - With cloud-based archives for your on-premises mailbox users, you can perform seamless discovery searches across both the on-premises primary mailbox and the cloud-based archive. When users are placed on litigation hold in your on-premises organization, their cloud-based archive is also placed on hold.
- Lower storage costs
 - Moving historical e-mail data to a cloud-based archive allows you to reduce your organization's storage requirements.
 - You can provision users' primary mailboxes with appropriate mailbox quotas, which keeps mailbox sizes in control and your storage costs low.
- Provide Anywhere Access
 - Using Outlook 2010, Outlook 2007 or Outlook Web App, users are able to access older messages and content in the archive transparently, without requiring any additional configuration on their computers.

Policy and Tags

The default policy incorporates both archive and retention tags.

The default policy will move mailbox items older than two years into the archive mailbox. The default policy setting for retention is to Never Delete email in the mailbox or the archive mailbox.

Archive (when should email be moved to the archive mailbox folder)

- Default policy is 2 years
- Users can override with the following settings
 - 1 year (Tag)
 - 5 years (Tag)
 - Never (Tag)
 - Use Folder Policy(Tag)

Retention (how long should we keep the email ---applies to both mailbox and archive mailbox)

- Default policy is Never Delete (keep forever)
- Users can override with the following settings
 - 1 Month Delete (30 days) (Tag)
 - 1 Week Delete (Tag)
 - 1 Year Delete (Tag)
 - 5 Year Delete (Tag)
 - 6 Month Delete (Tag)
 - Never Delete (Tag)
 - Use Folder Policy (Tag)

Agency administrators can request an agency specific policy that can have different settings than the default. They can also decide whether to allow users to have override capability or not.

Agencies can disable the use of .pst files via Active Directory Group Policy. You can find more information on the Mine site using the link below:

https://mine.mt.gov/it/pro/email/Exchange_2010_Information_and_Links/managepstfiles.mcp

Moving Messages to the Archive Mailbox

There are several ways to move messages to archive mailboxes:

- Move or copy messages manually
 - Mailbox users can manually move or copy messages from their primary mailbox or a .pst file to their archive mailbox. The archive mailbox appears as another mailbox or .pst file in Outlook and Outlook Web App.
- Move or copy messages using Inbox rules
 - Mailbox users can create Inbox rules in Outlook or Outlook Web App to automatically move messages to a folder in their archive mailbox. To learn more, see [Learn About Inbox Rules](#).
- Move messages using Archive policies
 - You can use Archive policies to automatically move messages to the archive. Users can also apply a personal tag to move messages to the archive. For details about archive and retention policies, see [Archive and Retention Policies](#) later in this topic.
- Import messages from .pst files
 - In Exchange 2010 SP1, you can use a mailbox import request to import messages from a .pst file to a user's archive or primary mailbox.

What does it look like?

- ▷  **Inbox (31)**
-  **Drafts**
-  **Sent Items**
-  **Deleted Items**
-  **Conversation History**
-  **Infected Items**
-  **Junk E-Mail**
-  **Outbox**
-  **Quarantine**
-  **RSS Feeds**
- ▷  **Search Folders**
- ▷ **Archive - jmarks@mt.gov**
- ▷ **My Old PST File**

What does it cost?

Service Category: Email

Service: Email - Archive

Brief Service Description: (New) allows customers to have a copy of their mailbox maintained in a separate location that includes all of the correspondence that was present at the time of the service being enabled, and it captures all additional correspondence sent to and from the specific mailbox.

FY 2014 Annual Rate: \$31.06

FY 2014 Invoice Rate: \$2.59

Frequency and Unit: Monthly per Mailbox

<http://sitsdservicecatalog.mt.gov/content/documents/Rates/RateSheet>

What about legal hold?

- How:
 - Submit a Service Center Ticket
- What's kept:
 - Normal retention is 14 days. When a legal hold is enabled on a mailbox the retention is in place until turned off.
- Cost:
 - Archive Storage costs apply once a legal hold is enabled. The current rate is .29 per month per GB.

An employee left us, what do we do with their mailbox and archive mailbox?

Options:

- Delegate rights to mailbox and archive mailbox to supervisor
 - Former employee's AD account can be disabled
 - Supervisor can directly attach to former employee's mailbox and archive
- Collapse mailbox and archive into a .pst file and allow supervisor to attach to the .pst file
- Request Exchange group to copy items in mailbox and archive into Supervisor's archive.

Questions?