

Electronic Mail Collection and Preservation (EMCAP) Tool

Minutes – Conference Call

September 28, 2007

9:30 AM

Participants – Kentucky: Skip Hunt, Cindy Hamilton, Mark Myers, Glen McAninch; North Carolina: Ed Southern, Druscie Simpson, David Minor, Kelly Eubank; Pennsylvania: Cindy Bendroth, Linda Avetta

Timeline

Glen is concerned that the current revised timeline is a little vague and would like more information on the technical specifications. *Kelly* says the technical specs have been submitted to IT to be reviewed. *Linda* believes that the February deadline for completed software and implementation doesn't allow for enough time to develop training. *Kelly* explains that the October to February timeframe proposed would include North Carolina testing the tool in-house to address any issues with the programmer.

David explains that the initial installation time for the other states is not spelled out in the timeline but will be once we determine what it will take. Then we can create a sub-timeline, or task list. One option is to install it at NC and have everyone test the server from their (KY and PA) site. The email client would be configured to use the IMAP server at NC. A second option would be to wait until February 2008 and send out an installation package, with it still being tested here in NC.

Technical specs require that the software is delivered in 3 intervals. Certain things must be completed at that 1/3 mark, like the user interface. We would not have everything completed but would have enough to begin testing and start work on documentation.

- Training

Linda suggests that we should start the training module in January since we will need something to test in order to create it. *David* explains that you can simulate the environment for your users using a configuration going to a Hotmail account, for example. Could document how that will work to encourage how your users will move mail from one place to another.

The training will be geared to the end-user. *Linda* says PA can't use Hotmail and can't have two Exchange accounts, so they will need to see something in order to develop the training. *Druscie* suggests that training should also include how to manage your email account. We can use existing training materials. *Mark* notes that training generally requires just as much time spent on teaching how to set up folders in Outlook, including creating folders, moving a folder, and creating a message, as it includes records management.

- Account Set-up

Skip asks to clarify about the two Exchange accounts *Linda* mentioned. He says you can have two accounts in Outlook open at the same time, such as IMAP and public folders. *David* explains that you can't have two accounts on two Exchange servers within Outlook open at the same time. You could have

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Minutes – Conference Call

access to another mailbox, but if it's set up as a personal folder, special scripting would be required to retrieve that mail.

David wants to use IMAP protocol, so that the user would have an Exchange mailbox and an IMAP account. The next step would be to give each user a personal folder which is a shared folder between the person and the archives. However, we are not prepared to write software to come and talk to a server and grab that mail. It would be easier, but we are not prepared to do that right now.

Skip says that anybody's network would not allow them to bring IMAP across their firewall. In Kentucky, for example, they use VOIP to show them their voicemails and faxes in a mailbox open in Outlook, but this is within their network.

Glen says Kentucky has a mysql server, and he is willing to install the hMail server and test this feature. *David* has a set of instructions to set up hMail (not POP or SMTP) inside the private network to keep it secure. It does not receive incoming mail, but will be a storage place to store mail.

Skip suggests taking this scenario one step further. Kentucky could use terminal services to allow the group to come into their network as a full client in KY and have access to this hMail server, if this is of interest to the others. You wouldn't need a VPN; instead, you could just log in to remote desktop. This would give people a test exchange. *David* says we would have to check with DCR-IT if it were set up in NC. *Kelly* says that NC could try and do the same thing, if DCR-IT agrees, since we don't already have a terminal services server set up. NC will set up an IMAP server here and give our clients accounts.

Kelly clarifies the discussion: Kentucky will host a test environment where the user will connect to the network, have a test desktop with an email account and hMail account very similar to what the Exchange environment will do. North Carolina will create the same in a production environment to test GroupWise and Lotus Notes.

We will have to create a Web site that users can utilize for password problems.

Skip clarifies the model: Someone is using Outlook and moves mail from one account to the hMail/IMAP mailbox. On the backend, the hMail server will do some processing and move that mail into a repository. The backend mail server synchronizes with the XML store; it will not be deleted by the backend. Is there going to be browser access to this repository?

David says at this point there will not be access. The user would have to ask for an export as a PST file.

Skip sees no firewall issues, as long as the server is within the firewall. *Linda* doesn't foresee any problems in Pennsylvania with this set up, as far as the initial testing. They shouldn't have any problem connecting to an IMAP server themselves through terminal services. *Skip* says there would probably be some client configuration on the virtual desktop. The first time Outlook gets started on that desktop it will have to be configured to access the IMAP server and Exchange server, so you still have client configuration on the individual desktop. We would probably want clients to have access to a PST so if

Electronic Mail Collection and Preservation (EMCAP) Tool

Minutes – Conference Call

they had a mail account being delivered to a PST you would see what it takes to move mail from Exchange and from a personal folder. The email address would belong to Kentucky and reside on a Kentucky server. It would show up in Outlook on the left with the other folders.

Linda says that if this means we still have to configure the client on each desktop, this would be a problem. *David* says that this is just on the virtual desktop, so it gets us past the training issue – seeing the tool in action – but not Pennsylvania production issues. *Linda* says this could show Pennsylvania IT what has been developed and what Kentucky is doing which will help convince IT to let them install it in February when it's ready.

David will be glad to do some of the configuration work so that we don't have to do it. The steps are addressed in rough installation instructions, which won't take long to refine.

Glen will give *Skip* the names of the people who would need to have access to the active directory and he will assign mailboxes. There will be 5 people in NC and 2 in PA.

This resolves the training issue.

Kelly is doing all she can to get the contract approved. As for any other issues with the timeline, October and February are the two unknowns because of the challenge of working through ITS. We will put a flexibility “disclaimer” with the timeline on the grant Web site. March is still doable in NC for the participants, and we can roll it out in August. KY is in transition with their governor; so it's a logical time to start approaching agencies regarding regular transfers. They'll make an extra push to get participants November through December.

PA's TAR

The Technical Approval Review (TAR) document is required by PA's IT department. *Kelly* notes that it needs to be updated to include the testing component that was discussed today, regarding testing it remotely. *Linda* will send it out to KY and NC and let everyone review it after added the information about testing in a virtual environment. *Skip* will have the accounts set up so we can confirm that we can log in and set up virtual Outlook.

Software Development Issues

Kelly has talked with ITS to review the contract issues.

Outreach

- SAA

Mark Conrad is more than happy to serve as a moderator, and contacted Susie Long and John Slate about it. *Kelly* was recused from the Government Records section vote and *Mark Myers* was recused from the Electronic Records vote, as we want two section endorsements for the presentation.

Electronic Mail Collection and Preservation (EMCAP) Tool

Minutes – Conference Call

- NAGARA

Cindy will submit a proposal to NAGARA.

- Best Practices Exchange

Linda asks if the Best Practices Exchange in Montana is still included in the travel for the grant. *Kelly* confirms that it is, and that the conference is the last weekend in May, 2008.

Other Issues

- North Carolina Update

Kelly shares that the Secretary of State has signed on for the pilot, and the Statewide Emergency Management Department is interested. They use GroupWise. We have a meeting with them next week, and we need to follow up with the Governor's office.

- Wrap-up

David will update instructions for setting up the hMail server and configuring Outlook for it.