

## **HSEN Modernization – Exchange Upgrade**

### Frequent Asked Questions

March 2004

#### **What is the HSEN Modernization – Exchange Upgrade project and what are the benefits?**

E-mail has become a critical business function, especially for government as it strives to become more virtual, resilient and efficient. The economy has been in a downturn, and organizations continue to receive the mandates to "do more with less." Because e-mail is ubiquitous and relatively stable, and users are trained in its use, it provides a vital base for collaborative initiatives both internal and external to each government entity.

OFT's goal with the NYSeMail Project is to improve government service, making state government more efficient, integrated, cost-effective and accessible. Centralized and standardized e-mail will make communication available in a way that supports place-independent and device-independent work, providing access to critical data and communications, even in times of crisis. It will dramatically improve reliability and create the ability to swiftly respond to change, while at the same time decreasing the state dollars required to maintain all of the current disparate systems.

The NYSeMail Project has enabled the following services to be offered to all state and local government entities beginning in the first quarter of 2003:

- Support of two classes of service:
  - Fat client – Microsoft Outlook
  - Web Access
- A training strategy that has minimal impact on the users and is cost effective for all shifts
- The ability for agencies to maintain their autonomy
  - Agency specific address books
  - Statewide address books
  - Standard naming conventions
- The ability for agencies to have different levels of administration
- Decentralization of the administration of:
  - User accounts
  - Distribution lists
  - Public folders
- Calendaring delegation (with private feature)
- Shared calendaring between and within subscribing agencies
- Ability for resource management
- Control of spam mail
- Anti-virus solutions
- Redundancy and backup/restore strategy
- Establishment of a standardized infrastructure – a scalable and reliable platform - based on a single technology

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#### **Who is leading the overall project and what are their skills?**

The HSEN Modernization – Exchange Upgrade project team has been established within the Office for Technology Statewide Applications area. It is led by state employees who have over 25 years of state experience and who have worked with electronic messaging since its inception. The OFT includes IT technicians with significant knowledge and experience in managing electronic messaging, architectural design, application development, networking, security, systems, operations, project management, quality assurance, training, and customer service

Also included in this team are Information Technology professionals from Microsoft.

#### **What are the some of the major steps and the timeframe for this project?**

Some of major steps include: analysis and design of the core architecture, build a test (lab) environment, build a core infrastructure to support the HSEN users, work individually with counties to plan each migration and ultimately migrate the HSEN's users to this system, and continued update/maintenance and support of the system.

At this point in the project, the analysis and strategy has been completed, testing is complete, the core hardware infrastructure has been designed and is currently being built. Migration strategies have been developed and processes and procedures are being drafted. The next step is to begin determining the migration priority and develop the site specific migration plans. There are not yet specific designated dates for each individual agency or county to participate at this time; however, we expect to publish the schedule in the next few weeks.

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#### **What email software is currently in use in agencies and what will be used for this project?**

Agencies currently use one of the following products: Exchange 5.0 or 5.5 and Outlook 2000, 2002 or 2003. This project will use Exchange 2003, Outlook 2000, 2002, 2003 (all with latest service packs) and Outlook Web Access 2003.

#### **What are some of the functions that will be available to users in the full Outlook client?**

The standard email and calendaring options that normally are part of the Outlook client are included.

Some examples of common functions are: sending and receiving mail and attachments, outbox, personal folders, rules to manage mail, preview messages, follow-up flags, public folders, proxy feature, email signature, distribution lists, columns/tables in messages, spell checking, personal and public address books, calendar entries with reminders, scheduling, color coding appointments, reoccurring meetings, notes and delegated tasks.

#### **Will there be file attachment size limits and can they be changed?**

Attachments will be limited to 10Mb. This is larger than the current limitation and is based on industry standards. Best practices do not recommend using email to send very large attachments as they can slow the system for all users and impact storage and backup facilities. Alternative means for the transmittal of large files and sharing of information can be provided (e.g.,FTP, document management system, public folders).

#### **What types of training will be provided and who will pay for it?**

OFT will work with the HSEN Agencies to plan appropriate training. Because this is an upgrade and not a replacement, the every day functions will remain the same. OFT will distribute informational guides outlining new features and how to use them. Agencies will also be able to select from other training options, such as CBT or LearnLinc. Each HSEN agency will determine the best way to deliver training to their constituents.

#### **Will we have remote access and can remote access be restricted?**

Yes. There is an Outlook Web Access (OWA) client, which provides remote access and has most of the functionality of the full client. This remote client can be accessed via an internet browser.

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#### **Will users be able to choose their own email editing tool?**

The Exchange/Outlook client allows messages to be created in HTML, rich text or plain text format. The user can decide if they want to use the included email editor or Word mail editor.

#### **What special device access will be available and will PDAs be supported?**

Blackberry (RIMM) and PDA synchronization will be available. Additional functionality is still to be determined. It is the intention that agencies not lose any of their current functionality. The information on agency specific PDA devices will be gathered through the data collection/ planning process.

#### **Will there be a standard for user email addresses?**

Yes. In addition, aliases may be established for a user so that incoming mail addressed to a prior email address will continue to be delivered to the appropriate user. When a user replies to new messages, their new address will be reflected in the message's 'From' field.

#### **Where will mail servers be located?**

The servers will be located in a central OFT location.

#### **Will administrative functions be performed at the agency-level or centrally and what is the provisioning tool?**

Some functions will be centrally administered by OFT such as the support and maintenance of the core email infrastructure, network availability, overall directory responsibility, the backup/restore function, problem investigation/resolution. Agency and county designated mail administrators will be provided with a provisioning tool (Webstar) that will empower them to do various functions, such as: add users, change user information, administer public folders, and create public distribution lists.

#### **What can users do to prepare for the migration?**

LAN Administrators need to collect information about their current email environment. Questions are being developed by the HSEN Modernization – Exchange Upgrade project team which will help collect this information. Sites will need to identify technical

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staff who will work with the eMail team. Users should also begin to clean up their mailboxes. Old correspondence and files no longer used or needed should be backed up to disk or CD (or deleted) and removed from the system.

#### **Will we be able to migrate our current email to the new system?**

An individualized migration plan will be developed for each site. There are different migration paths that will be offered. The needs of the site and the technical feasibility will determine which path is chosen.

It is anticipated that most sites will want email and calendar entries migrated. Some of the decision points would include how much of the data needs to be migrated (such as resources and archived mail) in addition to current mail and calendar entries.

Again, in anticipation of a variety of needs, OFT will present a range of options: creation of new mailboxes (no data migrated), data transferred in an alternate form (such as .pst or other files), full transfer of mailbox and data.

#### **What type of security, virus protection and anti-spam will be provided?**

The full client uses VPN and the Outlook Web Access (OWA) client uses Secure Socket Layers (SSL) with encryption between the OWA client and browser. Scanning of both inbound and outbound mail for viruses will also be provided; as will spam blocking.