



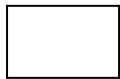
Report of the Chief Democratic Services Officer and the Chief Officer (ICT)

Member Management Committee

Date: 12th May 2009

Subject: Update on ICT Developments: Implementing the Collaboration Environment (ICE) and developing a technical solution to assist Members in the management of their Casework.

Electoral Wards Affected:



Ward Members consulted
(referred to in report)

Specific Implications For:

Equality and Diversity

Community Cohesion

Narrowing the Gap

1.0 Purpose of This Report

1.1 This report has been requested by the Member Management Committee and provides an update on ICT developments including:

- Options for consideration around the transition of Members' email accounts from Lotus Notes to Microsoft products (Outlook, Exchange, Sharepoint) as part of the Implementing the Collaboration (ICE) project
- The training which will be available for Members as part of the ICE Project.
- The project to deliver a technical solution to assist Members in managing their case work

2.0 Background Information

2.1 A report to the Member Management Committee of 14/4/09 advised of the move from Lotus Notes to Microsoft Outlook and Sharepoint as the first part of the Implementing the Collaboration Environment (ICE) Project and indicated that a consequence of the transition was that whilst the changeover will provide many advantages to assist both Officers and Members in the way that they work, and provide greater value for money solutions, there is a limit to the size of mail files which could be transferred.

- 2.2 The report confirmed that ICT officers were working with Microsoft and Members Group Support Officers to provide alternatives and workarounds to this limitation in order to minimise disruption and inconvenience. It was agreed that officers would report back to Member Management Committee with options for consideration around the technical solutions which could be utilised to assist in this process.
- 2.3 The report also indicated that a future report to this committee would contain information about the training and support which will be offered to Members as part of the project.
- 2.4 Officers have been working with the ICT Reference Group appointed by Member Management Committee and chaired by Councillor Latty to progress the development and introduction of a technical solution to assist Members in managing their casework.
- 2.5 An options paper was brought to Member Management Committee on 18th November last year and officers undertook to work with the ICT Reference Group to investigate the developing of a system based on the Microsoft Sharepoint and associated technologies which will be delivered as part of the ICE project.
- 2.6 At the Member Management Committee meeting on 14th April, officers confirmed that they were to complete a feasibility study and develop a business case to identify the associated development costs. The ICT Reference Group has considered Members Management Committee's desire to accelerate the process and met to discuss ways in which the technical solution could be delivered by the end of the year. If the decision is taken to proceed, a bid for funding would be pursued, a formal Project Board convened and a project commenced under the provisions of the Council's Delivering Successful Change framework.

3.0 Main Issues

Options for transferring Members' Mail Files

- 3.1 Members Management Committee resolved, at the meeting on 14th April 2009, that Corporate ICT Services must ensure all Members' emails are transferred from the current Lotus Notes system to the new system as part of the Implementing the Collaboration Environment (ICE) Project. This arose from a paper presented explaining that Microsoft recommend the maximum email file size limits of Microsoft Outlook 2003 is 2GB. The 2GB limit equates approximately to 350,000 standard size emails without attachments (although in practice the number will be substantially fewer due to the number of email attachments which members receive).
- 3.2 At the time of the move to Microsoft, over 50% of Members will have a mail file which is over Microsoft's recommended maximum. During the past three months ICT have been investigating options for moving Members' emails to the new system.
- 3.3 These investigations have resulted in three potential options. These options, along with their advantages and implications, are provided below.
- 3.4 **Option One: Move all email to Microsoft Outlook 2003**

This first option is to ignore Microsoft's recommendation and move all email from Lotus Notes to Microsoft Outlook 2003. Doing this would mean that some Members would have a mail file over four times the maximum recommended size of 2GB.

Advantages:

- All email is stored in one place, making it easy to search and manage mail from an end-user perspective.

Implications:

- Over half of all Members' mail files will be over the recommended maximum mail file size of 2GB.
- Mail files will be at risk of becoming corrupt and unreadable.
- Members are likely to experience degradation of service including performance issues, slow response etc, which at worst could lead to them being unable to access their email.
- Additional Members will be at risk when their mail file grows to over 2GB.
- It is likely that Microsoft will not guarantee support on mail files over the recommended size, this could mean that any issues with Members email may not be resolved and therefore they could lose access to their current and historic mail.
- This will impact on the move from Lotus Notes to Microsoft Outlook due to the migration difficulties with such large mail files.

3.5 Option Two: Mail Archiving

To procure a mail archiving tool which will allow Members' historic mail to be stored in an alternative location but still be searchable through Microsoft Outlook just as if it was in the mail file. **Mail archiving provides the appearance that all mail is still in the mail file and once opened the email will open the same as if the email was in the Microsoft Outlook mail file.**

Advantages:

- One place to search for email.
- Quicker response mail stored in Live Mail file.
- No need to manage email – mail is automatically archived.
- Use email in archive just as if it is in mail file, including searching, forwarding and replying to an email. (a caveat around this is that members would need to be connected to the network to retrieve archived emails).

Implications:

- There may be a slight time delay in opening mail which is stored in the archive.
- The costs of providing an archiving solution and that of storage required to store large member mail files.

3.6 Option Three: Store old email in Lotus Notes

In this option, Members emails received or sent before the move to Outlook will be stored in Lotus Notes and all mail after the move will be stored in Outlook. The old mail files can either be stored on a Lotus Notes Server, on a Members H:\ Drive (personal network drive), a shared network drive or on the C:\ (Hard) Drive of a Members Council Laptop.

Advantages:

- Familiarity with Lotus Notes.
- No change to email format or where it is stored.

Implications:

- There would be two places to search for mail, Lotus Notes and Outlook, which could be time consuming.
- The support contract with IBM for Lotus Notes is not being renewed, therefore any faults with Lotus Notes which Corporate ICT Services could not resolve would be difficult to fix as we would not have a formal third party support mechanism in place.
- Whilst the risk for faults that ICT cannot resolve is low, the risk will increase over time due to
 - The skill sets within ICT reducing over time due to Lotus Notes not being a primary application
 - The Lotus Notes system becoming more fragile and less reliable over time as the system can not be maintained effectively without an IBM support contract.
- In the event of a major fault which cannot be resolved, Members face the risk of losing access to their mail for a number of weeks whilst the data is restored from backup tape.
- Data stored on C drives (i.e. directly on to the hard drive of a PC/Laptop) which is not backed up on a server faces the risk of being permanently deleted if there is an issue with the PC / Laptop which cannot be resolved. Examples of this include if the hard drive of the device fails or if the data stored thereon becomes corrupted. This poses a risk to email stored only on a C:\ drive.
- Access to H:\ Drive (Members' personal drive on the network) is only accessible by the member i.e. other staff will not have access to the mail, therefore even though this is a secure area for the mail to be held, delegated access rights would not be available.
- Risk of performance issues accessing the email across the network.

Implementing the Collaboration Environment (ICE) Project – Update on Transition arrangements

- 3.7 All members will be provided with training on MS Outlook 2003 and the technical solutions provided to assist in managing their casework. In order to ensure the training is tailored and delivered at optimum times for members, Corporate ICT Services are working closely with Group Support and Member Development officers.
- 3.8 A three phased approach is being adopted across the Council for training in Outlook and Sharepoint. This approach includes:
- Day One preparation training to ensure that the new systems can be used immediately and with minimum disruption to day to day working practices
 - Best Practice and Refresher training will be available to maximise the benefits of the new systems including advice on best practice guidelines.

- Induction training will be provided to ensure that a basic, consistent level of training is provided upon joining the Council.
- 3.9 Training will be delivered to members as close to the transition date as possible to ensure that whilst the training is undertaken in a timely manner. As far as possible, training will be tailored to meet the needs of individual members.
- 3.10 The timescales for moving to the new environment will be defined in June. The Business Engagement Manager for the ICE Project is working with Group Support Officers and Member Development to ensure that members are moved at the optimum time both from a member and a project perspective.
- 3.11 Considerations include moving Group Support Officers before members to provide a level of support during and after the transition process whilst maintaining working practices around delegated access to email accounts and calendars throughout the process.
- 3.12 Once the dates for transition have been agreed, further information will be provided. This will include an opportunity for members to attend an overview demonstration of Microsoft Outlook and Sharepoint.

Update on System to support Members in managing their Casework

- 3.13 In the light of the Member Management Committee on 14th April the Members ICT Reference Group met to agree a pragmatic way forward to deliver a system to assist members in the management of their casework by the end of the year.
- 3.14 Members may recall that a comprehensive Statement of Requirements resulting from a workshop attended by ICT officers and casework support officers and approved by the ICT Reference Group was submitted to the Small Project Approval Board.
- 3.15 A Project Board will be set up to be accountable for this project and will be directly advised by the ICT Reference Group.
- 3.16 Officers have found the ICT Reference Group, an extremely useful forum in obtaining member views and requirements with respect to their ICT service and development requirements and recognise that it will continue to provide a vital function in assisting the delivery of a “fit for purpose” technical solution to assist members in the management of their casework.
- 3.17 A project brief has been developed which recommends an incremental development approach, initially concentrating on the core requirements which members have identified, namely:
 - a facility to set reminder dates for pieces of casework
 - alert members to overdue responses
 - notify members when cases need to be resolved
 - provide a repository for the electronic storage of associated case documents.
- 3.18 The advantages of this approach include:
 - Allows for benefits to be maximised i.e. by concentrating on core requirements
 - It facilitates members to concentrate on using the key tools within the new environment which are designed to work together such as email, calendar and document storage

- Allows members to “pick and choose” which elements of the technology they adopt and integrate into the way that they work individually (potential also to adopt different approaches on a case-by-case basis). This is particularly important given the number of different ways of working there are (hence Members can also adopt new solutions into their working practice at a time to suit themselves)
- Allows delivery of solution within timescales put forward by Member Management Committee (i.e. by the end of 2009)

ICT reporting to future meetings

- 3.19 It was also agreed at the Member Management Committee that ICT issues would be a standard item and that reports on Members PDAs (Personal Digital Assistants) and Performance Statistics would be presented to future meetings.

4.0 Implications For Council Policy And Governance

- 4.1 There are no implications for Council Policy and Governance

5.0 Legal And Resource Implications

- 5.1 Corporate ICT Services will work with Democratic Services to develop a budget bid to cover the additional costs of an archiving solution for members that is clearly a necessary requirement to meet members basic requirements from an e-mail system.
- 5.2 If the development of a technical solution to assist members in the management of their casework is progressed, a formal bid for funding will be submitted.

6.0 Conclusions

- 6.1 There is a solution to transitioning Members mail files without loss of emails.
- 6.2 Tailored training will be developed for Members in conjunction with Group Support Managers, Member Development and the ICT Reference Group.
- 6.3 A case work system for Members can be delivered within the required timescales.

7.0 Recommendations

- 7.1 Members are asked to support the recommendation for transitioning members emails to the new infrastructure by adopting Option 2 of the options outlined, that is to procure a mail archiving solution to store email.
- 7.2 Members are asked to approve the proposed way forward for the development of a case management solution for members.