



New York State's 90-Day Email Deletion Began in 2013

March 13, 2015

The NY Times reports that Governor Cuomo's 90-day automatic deletion of emails is a mere leftover from previous administrations. It's not true. This email deletion policy was implemented in June 2013, and the State's own memos prove it.

In June 2013, Karen Geduldig, General Counsel of the NYS Office of Information Technology Services wrote in a memorandum to all agency general counsels:

As of June 30, 2013, the State will be implementing a standard 90-day email management system for all State agencies. Email sent and received on or after June 30, 2013, will be retained for 90 days after the date on which it was sent or received unless otherwise deleted.

(Emphasis in original). That doesn't sound like a continuation of a historical policy. In fact, the very next line explicitly spells it out:

Under this new system, email that must be retained longer than 90 days can and will be saved.

And:

General Counsels should take the following steps to prepare for implementation of the new email management system.

And finally:

This new standard may change how some users manage their email. ITS staff will provide your agency staff with technical guidance...

Geduldig certainly seems to be under the impression that the policy she's announcing is new. Again, that memo is dated June 2013.



A month later, a July 2013 memo from Jean O. Quarrier, Deputy General Counsel of the NYS Department of Health to all employees of the NYS Department of Health, began with:

The Department of Health (“the Department”) is transitioning to a new 90-day email retention policy for all staff.

And continues:

Starting on July 30, 2013, email sent and received by persons working for the Department of Health and who are on Office 365 will be subject to a 90-day preservation period.

At no point does this memo, like the Geduldig memo, refer to this policy as a continuation of existing practice. It repeatedly describes the 90-day automatic deletion as "new." In fact, the Quarrier memo notes:

You may have a significant amount of email in your DOH active mailbox that pre-dates July 30, 2013. You will have at least 30 days to review old email in your active mailbox.

Again, DOH employees may have had a significant amount of email in their DOH mailboxes as of that date, because this 90-day deletion policy was brand new in 2013. If this policy had actually existed since 2002, the Quarrier memo would not have acknowledged that users would have had "a significant amount of email" that pre-dated July 30, 2013. Or that "starting" soon, email would be subject to a 90-day preservation period.

There's more: on February 20, 2015, New York State's CIO Maggie Miller wrote a memorandum to all NYS commissioners and agency heads, where she specifically said:

As you are aware, on June 30, 2013, the State adopted a standard 90-day email management and preservation policy. This is a reminder that the standard 90-day email management and preservation policy continues to apply in Office365.

This policy simply did not begin in 2002.



A few days later, on February 23, 2015, William Cross, Director of Business Solutions for the NYS Office of Information Technology Services wrote a memo to all employees of the NYS Department of State in which he said:

As a reminder to all DOS users, a 90-day email retention policy was adopted by the State in June 2013. Since that time, users have been required to delete any email older than 90 days...

In 2013, GovTech wrote about the migration of New York State agencies to a single Office 365 email system. Their article interviewed several high-level employees of New York State, including then-CIO Brian Digman. GovTech wrote “John Norton, CIO of the health cluster with the New York State Office of Information Technology Services, said that those users were put on Office 365 more quickly by migrating only the most recent 180 days of email to start with...”

If New York State had truly begun deleting emails older than 90 days in 2007, there would not be 180 days’ worth of email to transition. Even more bizarrely, in the GovTech interview, Norton explains that the move to Office 365 is “starting” with 180 days of email, implying that users have even more email.

And in 2010, the New York State Archives Government Records Services department published a set of principles and best practices for email retention, titled Developing a Policy for Managing Email. The Archives noted in its section on retention and disposition:

Purging all emails after a defined time period is not an acceptable retention and disposition strategy.

It is simply unbelievable that two NYS CIOs, general counsels and CIOs of various state agencies, and the New York State Archives themselves are all unaware of a policy dating back to 2007.

Appendix

Geduldig Memo June 2013

Memorandum

To: Agency General Counsels

From: Karen Geduldig, General Counsel, NYS Office of Information Technology Services

Date: June 18, 2013

Re: Email Consolidation and Email Management

Over the past year, the State, through the NYS Office of Information Technology Services (ITS), has been consolidating the State's disparate email systems to facilitate interoperability and enhance interagency communications. The next part of this process is standardization of email management. This is also important for the migration of current state agency email systems to the new cloud-based system. If your IT staff were consolidated within ITS effective November 22, 2012, ITS is responsible for all technical implementation of the steps detailed below. If your agency has its own IT staff, your agency staff is responsible for all technical implementation of the steps detailed below, although ITS is available for advice and guidance to support consistent technical implementations.

- The State is retaining enormous amounts of email data that is difficult to manage and interferes with operations.
- The State Archives has determined that most email communication does not constitute records that must be preserved under the law.
- Retaining only email that is directly relevant to operations and/or that is required by law to be retained will improve agency operations, knowledge transfer and succession planning. http://www.archives.nysed.gov/a/records/mr_pub_genschedule_accessible.html
- Federal agencies and corporations have implemented email management policies wherein email messages are purged from their systems 30, 60, or 90 days from the date sent or received, for example. Such a system will aid the State in improving its email management.
- **As of June 30, 2013, the State will be implementing a standard 90-day email management system for all State agencies.** Email sent and received on or after June 30, 2013, will be retained for 90 days after the date on which it was sent or received unless otherwise deleted. Thus, all email sent or received on June 30 will be purged from a user's mailbox automatically on September 29, all email from July 1 will be purged on September 30, and so on.
- **Under this new system, email that must be retained longer than 90 days can and will be saved.**
 - Litigation holds will remain in place.
 - Holds can be placed on accounts containing material potentially responsive to a FOIL request.
 - Users will be able to save email needed for more than 90 days, for example, for long-term projects.

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- No agency will have to delete material necessary to conduct its business or to meet legal requirements.
- **Older email will not be purged immediately. Any email 60 days old or older on June 30 will be withheld from deletion until July 30, 2013,** 30 days after the 90-day schedule takes effect. This ensures that users will have at least 30 and up to 90 days to review everything already in their mailbox as of June 30. For example, emails sent or received:
 - on May 1 or earlier will be purged July 30
 - on May 2-June 29 will be purged as they reach 90 days old, July 31-September 28
 - on or after June 30 will be purged as they reach 90 days old

General Counsels should take the following steps to prepare for implementation of the new email management system.

- Determine what litigation holds are in place and whether any of them are no longer necessary and can be released. Your IT staff is responsible for taking the technical steps necessary to preserve or release holds.
- Compile a list of staff on medical, maternity, paternity, or other long-term formal leave to ensure that their email is not purged before they have an opportunity to review it. Your IT staff will handle the technical aspects of retaining email.
- Compile a list of dormant email accounts, such as accounts from employees now separated from the agency. Contents of some of the accounts may require review before the contents are purged.
- Compile a list of group email mailboxes. If you determine that a mailbox could be the exclusive storage location for records that must be retained, then it should be reviewed before the contents are purged.
- Consult your agency records retention schedule to determine which staff members might have records subject to retention requirements of the Arts and Cultural Affairs Law stored exclusively in their email boxes or archives.
- Using the model email management memo to staff provided, create guidance for your agency staff on the new email management system. **Please note: information in the model regarding appropriately saving email content or the process for litigation holds may not exactly match your agency's, depending on your agency's specific email systems and litigation hold procedures.** Your IT staff will be able to describe the saving mechanism for your agency, but please also be in touch with me (contact information below) for assistance with this project.

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This new standard may change how some users manage their email. ITS staff will provide your agency staff with technical guidance specific to your agency's current email system and, upon consolidation, the new email program that will be used statewide.

I will be communicating with you to share specific guidance on the implementation of the email consolidation and standardization described here. If you have questions about the implementation of this standardized email process, please contact me.

Contact information: Karen Geduldig: (518) 474-3019, karen.geduldig@its.ny.gov
John Cody: (518) 473-5115 john.cody@its.ny.gov

From: Herman, Lisa (ITS)
Sent: Thursday, July 25, 2013 12:17 PM
To: its.dl.agency
Subject: IMPORTANT -- Reminder on Email Management Policy
Importance: High

This Message is being sent on behalf of Karen Geduldig, General Counsel at ITS

Good afternoon:

This is a follow-up to the memo that you received on June 18, 2013 (attached) regarding the new 90 day email management and preservation policy. **This message contains important clarifying information based upon feedback and questions we have been receiving since the June 18th memo so please be sure to read this fully.**

As a reminder: Starting July 30, 2013 email will start to be automatically purged from your email box 90 days after the message was sent, received or, in the case of a DRAFT email, created with two important exceptions:

Exception 1: If your mailbox is subject to a legal or litigation hold, ITS will retain your email, however, will do so separate from your active mailbox. Therefore, you may see your email purged from your active mailbox, however, it is being otherwise retained in the Microsoft Exchange Hosted Archive ("MEHA") for legal hold purposes. Legal holds will be placed on mailboxes that are reasonably likely to be related to a litigation. Only ITS's General Counsel places and releases legal or litigation holds on ITS employees' mailboxes. In addition, ITS staff that are currently on extended leave (disability, maternity or paternity leave, etc.) will temporarily be excluded from the policy so that employees can review their mailboxes when they return to work.

Exception 2: Any email messages that you specifically save under the "Retain" folder within your mailbox will not be purged.

You should be in the process of reviewing your mailbox and saving, in the Retain folder, any email messages that (1) are records under an ITS record retention/disposition schedule and need to be saved for a period of time longer than 90 days; and/or (2) you deem necessary to your ongoing work. Starting on July 30, any other messages in your mailbox that are not moved to your Retain folder will be deleted 90 days after being sent, received or created.

Points of clarification:

- **.PST folders:** The automatic purging of unnecessary email that is older than 90 days only applies to email files contained in your active mailbox. .PST folders are NOT part of your active mailbox. This means that files, including email, currently stored in your "Personal Folders" in a .PST file will not automatically be purged 90 days after that message – now saved in a .PST file – was sent or received. We have been hearing that people are spending time moving their .PST

files from their Personal Folders into the Retain folder. That is unnecessary since, again, .PST folders and the files within them will not be automatically purged. People should, however, take the opportunity to review their existing .PST folders and only save data that is required or necessary to be saved as described in the June 18 memo.

- **Third party storage services:** We have also been hearing and receiving questions about employees independently using a third-party service provider to store older email. Your work email is the property of ITS and only ITS, as an agency, has the authority to move it to, or otherwise store it with, a third-party service provider. Employees are prohibited from moving or otherwise storing their email with a third-party service provider. Violating this prohibition may create security and other exposure and may leave you personally liable – including financially liable - for any issues that arise from your unauthorized storage of ITS data elsewhere. Additionally, employees who move work email to a third-party service provider without authorization may be subject to discipline.
- **Group Mailboxes:** Email content in group mailboxes is also subject to the 90 day email management and preservation policy. If the unit, group or division that you supervise has group mailbox(es), you are responsible for identifying an appropriate person to review the content of that group mailbox's active mailbox for email that must be retained for longer than 90 days due to records retention/disposition schedule(s) or for operational necessity.
- **People out on extended leave:** ITS can temporarily exclude email accounts belonging to people who are out for an extended period, either on extended leave or (appropriately) using accruals for long-term absence. If this exclusion is desired, supervisors of any such employees should advise ITS Counsel's Office so that the employee's account may be temporarily excluded. This exclusion will be removed shortly after their return.
- **The System Cleanup Folder:** Your Retain folder exists within the "Managed Folders" folder in your email box. Along with the Retain folder, we have created a "System Cleanup" Folder. The System Cleanup folder serves as an alert to an employee that emails are close to the 90 day purge date. All mail items located in your Inbox, Sent Items, Drafts, Junk E-mail, conversation history, RSS feeds and all other user created folders and subfolder that have reached 75 days old will be automatically moved to the "System Cleanup" folder to highlight those items that are designated to be purged within 15 days. Email will not be automatically moved into this folder until after the first email purge beginning on 7/30/13. Thereafter, it will be moved on a daily basis.

If you have questions about this policy, please feel free to contact Customer Relations Manager at 518-473-2658, or email Customer.Relations@its.ny.gov or me (518.408.2476) or John Cody (518.473.5115) from ITS Counsel's Office.

Thank you.

E-mails to or from attorneys in ITS's Counsel and Legal Services office are attorney-client privileged and should never be shared outside of the agency without prior approval. Thank you.

New Email Retention Policy Announced

Background, Timeframes and FAQs

The Department of Health (“the Department”) is transitioning to a new 90-day email retention policy for all staff.

Since the Department has started a pilot project to transition email to the cloud-based Office 365 email platform, staff will participate in the 90-day retention system if they are now on Office 365 or when they migrate from Lotus Notes to Office 365. Additional information will be provided concerning transition timeframes when it becomes available. If there are delays in transition to Office 365, ITS staff will address the functionality of a similar 90 day retention period to Lotus emails.

Background information and the timeframes for staff currently on Office 365 follow.

Background

The State has been engaged in several initiatives to help government work more efficiently and consistently, including IT consolidation and transformation. A more efficient and consistent government means that we are more accountable, responsive and transparent to the public we serve. A next step in making government work better is standardizing how we, as a State, manage our email.

At its current pace, the State is creating enormous amounts of email data that is difficult to manage and interferes with operations. The State Archives has determined that most email communication does not constitute records that must be preserved under the law.

Retaining only email that is directly relevant to operations and/or that is required by law to be retained will improve agency operations, knowledge transfer and succession planning.

Federal agencies and corporations have implemented email management policies wherein email messages are purged from their systems 30, 60, or 90 days from the date sent or received, for example. Such a system will aid the State in improving its email management.

Timeframes

Standard email management will also ease migration of State email systems to the cloud, something that, as you may know, will be taking place in the upcoming months. Therefore, starting on July 30, 2013, email sent and received by persons working for the Department of Health and who are on Office 365 will be subject to a 90-day preservation period. As described in more detail below, you will have at least 30 days (at least until August 30) to review and appropriately save email sent or received prior to July 30, 2013. Email boxes that are subject to a legal or litigation hold will not be subject to the 90-day email preservation period. You will never be required to delete email that you need to save.

How the 90-day Email Preservation Period Works

The 90-day email preservation period will be effective July 30, 2013.

Any email that you send or receive on or after July 30, 2013 will automatically be purged 90 days after it is sent or received, EXCEPT:

1. Email content in DOH email boxes that are subject to a litigation hold (see FAQ 3 below) or other legal hold, e.g., it may be responsive to a current FOIL request.
2. Email content that must be saved for longer than 90 days or is needed for ongoing operational purposes (it must be appropriately saved by the user, otherwise the email will be subject to the 90-day email preservation period. See FAQs 2, 4 and 5.).

You may have a significant amount of email in your DOH active mailbox that pre-dates July 30, 2013. You will have at least 30 days to review old email in your active mailbox.

Date Email is Sent/Received	Date Automatically Purged
On or Before 6/1/13	8/30/13
After 6/1/13	90 Days after Sent/Received

Example: Email received on 6/2/13, will be purged 8/31/13

Quarrier Memo July 2013

All email 60 or more days old on July 30, 2013 (i.e. all email from June 1, 2013, and earlier) will not be deleted until August 30, 2013, 30 days after the new schedule is implemented. This is also the date on which it will be 90 or more days old. All email less than 60 days old on July 30 will be purged when it reaches 90 days old (i.e. email from June 30, 2013 will be purged on September 28, 2013).

This means you have until August 30, 2013, to:

1. Review the email in your active mailbox that was sent or received by you on or before June 1, 2013;
2. Identify email that you are required to save and/or need to save for ongoing operational project purposes and appropriately save those emails.

Frequently Asked Questions (FAQs)

1. What is the active mailbox?

Your active mailbox is what you would typically call your inbox and outbox or “sent mailbox,” as well as subfolders. It contains the email you send or receive until it is deleted from your active mailbox.

2. How do I identify email messages that are required to be saved for longer than 90 days?

In addition to legal or litigation holds (see next FAQ), email content may be required to be retained for certain periods of time pursuant to existing agency records retention schedules. The records retention schedules applicable to you will not be changing at this time, so anything you would have saved pursuant to the schedule prior to implementation of the 90-day email preservation period should still be saved. This 90 day retention process for email should not present any new issues.

DOH records retention schedules are broken up by business function. It is a good time to review the schedules and the types of records you create – both in email and otherwise – so that you can retain these records appropriately and consistently. Records retention schedules for DOH are addressed in the NYSDOH Administrative Policy and Procedures Manual No. 36, titled “Records Retention & Disposition,” and in the NYS Education Department’s “General Retention and Disposition Schedule for New York State Government Records” and are

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available here. If you have questions about the application of ITS's records retention schedules to your records, please contact your supervisor or Counsel's Office.

According to NYS Archives, most email communications are not records that must be retained and are therefore suitable for immediate destruction. Some messages and attachments are records and should be maintained in appropriate electronic or paper files and disposed of consistent with applicable records retention schedules. NYS Archives has material, resources and guidelines, much of which is available online, to help individuals identify records that must be retained for records retention purposes. Visit NYS Archives' website for guidance and information on records retention. (Workshop handouts can be found here.)

3. My email is subject to a legal or litigation hold. How will the 90-day email preservation period affect me?

The 90-day email preservation period does not apply to ITS email that is subject to a litigation hold. If an employee's email is on legal or litigation hold, none of his/her email will be purged until the legal or litigation hold is released by DOH Counsel. The 90-day email preservation period will go into effect for that email once the hold is released (the user will be given time to review contents), so it is still important that users retain any records received by email in an organized fashion in accordance with retention schedules. If the contents of an employee's email are potentially responsive to a FOIL request, the email account should be put on hold until all required documents have been produced to the FOIL officer.

4. How do I identify email messages that need to be saved for longer than 90-days for ongoing operational project purposes?

We recognize that some email is not required to be saved pursuant to records retention schedules but is highly relevant and useful to the execution and implementation of ongoing DOH work. Email content that will enable the furtherance of DOH work should be retained outside of active mailboxes. Email content that is non-essential to DOH work, outdated or related to resolved matters and serves no further purpose should not be saved, unless the email content is required to be saved for legal reasons.

5. How do I appropriately save email content that is required or needs to be saved for longer than 90 days on Office 365?

For DOH employees the appropriate way to save email content that must be saved for longer than 90 days is to mark it with a special retention tag in your active Office 365 mailbox called

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"Never Delete (Never)." Information specifically about how to save email content that is required or needs to be saved for longer than 90 days on Office 365 is provided in these instructions.

/s

July 30, 2013

Jean O. Quarrier, Deputy General Counsel

New Email Retention/Destruction Policy Tied to Microsoft System, Albany Times Union, August 14, 2013. Link: <http://blog.timesunion.com/capitol/archives/193168/new-email-retentiondestruction-policy-tied-to-microsoft-system/>



Office of Information
Technology Services

ANDREW M. CUOMO
Governor

MARGARET MILLER
Chief Information Officer

Memorandum

TO: NYS Commissioners and Agency Heads
FROM: Maggie Miller, NYS Chief Information Officer
DATE: February 20, 2015
SUBJECT: Update on Migration to Office365

As you are aware, based on the recommendations of Governor Cuomo's SAGE Commission, the State has been engaged over the past three years in a major initiative to streamline government and make it work more efficiently, effectively and consistently through modernizing our information technology systems. One part of this transformation has been to consolidate the more than 20 incompatible and outmoded email systems that existed in the State into a single, cloud based email system called Office365. I am happy to share with you that migration to this single statewide email and collaboration system is nearing completion.

The consolidation of our email systems is revolutionizing how we, as a State, communicate and collaborate with each other. Before this email system consolidation we, as partner agencies, could not readily find each other's contact information. Now we can easily communicate, collaborate, plan, schedule conference calls and meetings and manage our online correspondence consistently and effectively. This is a significant accomplishment and I want to thank everyone for their hard work in making government work better.

As you are aware, on June 30, 2013, the State adopted a standard 90-day email management and preservation policy. This is a reminder that the standard 90-day email management and preservation policy continues to apply in Office365. The 90-day email management and preservation policy recognizes that some email must be saved for longer than 90 days due to records retention schedules and other operational needs. Please remind your staff that any email messages that must be saved for longer than 90 days should be saved either in agency files outside of users' mailboxes or in their "Retain" folders. If you have questions about preserving email in Office365 for litigation hold purposes, please contact your General Counsel.

Thank you again for your continued cooperation and commitment to making government work smarter.

Cross Memo February 2015

From: Cross, William (ITS)
Sent: Monday, February 23, 2015 11:51 AM
To: dos.dl.All.Users
Subject: FW: 90-Day Email Retention Enforcement

As a reminder to all DOS users, a 90-day email retention policy was adopted by the State in June 2013. Since that time, users have been required to delete any email older than 90 days unless there is a need to retain the mail longer for record retention or operational purposes. In these cases, email may be moved to the “Retain” folder within Outlook or saved to a location outside of the Office 365 mailboxes.

While automatic enforcement of this policy (automatic purging) was enabled within NYSeMail at the time the policy was implemented, this purge may or may not have been fully-implemented within the new Office 365 environment.

We have been notified that ITS will, again, be enforcing the automatic 90-day purge policy beginning this evening. As such, users are encouraged to review their mailboxes and take the appropriate action to save any messages that need to be retained longer than 90 days, either via the “Retain” folder or saving outside of Office 365.

Note, most DOS users currently utilize Outlook archives for purposes of storing email outside of Office 365 mailboxes; however, ITS recommends storing messages to an agency file share (such as H: or G: drives). Also, you are able to create folders under the “Retain” folder to keep saved email organized. If you require any assistance in moving email or utilizing archiving, please contact the ITS GGC Help Desk at: its.sm.esd@its.ny.gov or (518) 473-6936

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3.4 E-discovery

A government or agency may decide to develop a separate, highly detailed set of e-discovery policies and procedures because of the complex legal issues involved in an e-discovery action. This is important, since the failure to respond appropriately can result in legal sanctions, loss of reputation, and other significant costs.

An e-discovery policy must stipulate that if someone in a government or agency knows of an impending legal action, that individual must notify legal counsel immediately. Because records are increasingly electronic, legal counsel must, in turn, contact the records management officer and the lead information technology professional (either a consultant on retainer, program area director, or chief information officer) for two reasons: to understand the information technology environment, and to know the content and format of potentially relevant electronic records.

The more information available to legal counsel beforehand, the better. Ideally, legal counsel should know, or have the resources available to discern quickly, how an agency or government uses email and the types of records likely to reside in the email system.

3.5 Retention and Disposition

Simplifying retention

Purging all emails after a defined time period is not an acceptable retention and disposition strategy. Each email record belongs to a records series that is included (or needs to be included) in an official retention schedule. In today's business environment, it is highly unlikely, if not impossible, that a government or agency would transmit only emails that are non-records or that have a retention period of "0 after no longer needed."

It is possible, however, to simplify retention and manage emails as groups of messages belonging to a cluster of records series with similar retention periods. First, the RMO and other government officials must know the retention requirements of emails transmitted within their government or agency. State agencies must determine whether emails are part of records series that have been or need to be scheduled. Retention strategies can then be applied selectively, according to the retention periods of emails transmitted and received by individual users, program units, or a combination of these.

Some email management strategies include

- identifying those units that transact business almost entirely by email (for example, a contracting unit that collects responses to RFPs strictly via email), and then focusing an automated solution on those units and their records

New York State Ready for Quick Move into Cloud Email

BY: [Matt Williams](#) | August 19, 2013

New York State government is poised to move quickly to a single cloud-based system for email and office tools, with the target date for the completed migration less than five months away.

Officials are confident it won't take long to transition onto Microsoft Office 365, in part because approximately 70,000 of the state's 120,000 employees already are using NYSeMail, the state's centralized on-premise email system built on Microsoft Exchange.

Twenty-six agencies use NYSeMail, while 50 agencies manage their own standalone email systems. Some state agencies still have thousands of users on GroupWise or Lotus Notes, with no consistency in the version or patches they are using. Brian Digman, the state's CIO, said agencies also are using several different versions of Office.

"We were just all over the map," Digman said.

New York State projects it will save at least \$3 million annually by moving to cloud email, which is part of a larger IT transformation project spurred by Gov. Andrew Cuomo. Consolidating email was one recommendation of the SAGE (Spending and Government Efficiency) Commission, which Cuomo formed two years ago to identify where government could become more efficient.

With Office 365, each state employee will get a 25-gigabyte mailbox, a 50-fold increase to the state's current 500 MB limit. They also will be able to securely access their email and Microsoft's other offerings, including Office and SharePoint, on a variety of devices when connected to the Internet.

Digman said having a common platform should improve efficiency and interagency collaboration. The state's agency-level CIOs already are discussing how the new platform could be integrated as they're writing shared applications, and how Office 365 can be used to more efficiently communicate with citizens and to support new initiatives brought forward in the state.

"We're in a much better position to respond quickly because it's in the cloud," Digman said.

Moving to cloud email also will allow the state to get out of email administration. As part of the IT transformation, the state is consolidating multiple data centers into a single Tier 3 facility and standing up a separate disaster recovery site.

"I think what will happen is people who had been at least part time administering email servers -- we'll need their help consolidating the servers that are left over and in administering the new data center," Digman said.

The five-month time frame for the Office 365 migration is aggressive, but Digman said confidence has been boosted by an earlier pilot project that occurred in the New York State Department of Health. More than six hundred users there recently were moved from Lotus Notes to Office 365.

John Norton, CIO of the health cluster with the New York State Office of Information Technology Services, said that those users were put on Office 365 more quickly by migrating only the most recent 180 days of email to start with (only a very small fraction of employees regularly access email older than that), and focusing in the beginning on calendaring, word processing and training.

"The technology is not too hard," Norton said. "It's really the training. We put a lot of time into that."

The state gave the pilot users one-on-one training, computer-based options, online books and several other options,

he said.

Norton added that he's eager to have his agencies on the same version of SharePoint to improve collaboration. And he anticipates that his health agencies will save money. Twenty-four hospitals that before had their own email systems -- 24 separate instances of GroupWise -- will soon be consolidated on Microsoft.

"All hands are going to be on deck. ... Our goal is to meet (the end-of-year time frame) the governor has put out," Norton said, adding that the exact timing likely will depend on how much email is migrated and other management decisions.

New York has opened its Office 365 contract to all localities in the state that want to participate. Digman said cities and counties have expressed interest in the days since the agreement was announced publicly last week.

"I would envision a day where they jump right on board for the same reasons the state did it," Digman said.

More than 1 million U.S. government workers have been moved or are being moved to Office 365, according to Microsoft. The company's clients include the cities of Chicago, San Francisco, Seattle as well as the state governments of California, Texas and Washington.

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