

E-Mail in the Cloud: What it Means For You

Presented by:

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For

N.J. State League of Municipalities 2009 Conference

Where is Your E-mail?

- It's on a server in your organization's computer room
- It's on your computer – ISP provided
- It's in the cloud
- On your computer and in the cloud and/or on your handheld device

What's the Cloud?

- Organizations that maintain computers, servers, and hard drives that store your e-mail and make it available to you through an Internet connection
- Google G-Mail
- Yahoo! Mail
- Microsoft: MSN, Hotmail and Live

The Problem with E-mail on a Standalone Computer

- May not be backed up or use PDF based solutions
- Accidentally deleting stuff
- Hard to search and manage
- Possibly limited storage space
- Stuck on your PC
- Some spam and antivirus protection
- You need to think about it

Why the Cloud

- Free or very low cost
- Can use your own domain name
- Most services have large to “unlimited” storage capacity
- Provides backups – very reduced risk of loss of data
- High-level anti-spam and anti-virus protection

Why the Cloud

- No staff resources required
- Providers always have leading edge technology
- Very good search and organization tools
- As secure as your password security practices
- Ideal for organizations with no network or IT support staff; other organizations can consider it as well

Using Personal E-mail Accounts

- No reason to use personal e-mails for work
- All e-mail services permit free additional accounts
- Software and handhelds now facilitate reading multiple e-mail accounts in software

Bottom Line

- If you are not using a Cloud service and you have good internet service— you should
- If you're not, get good internet service and use the cloud

EMAIL RETENTION AND DOCUMENT MANAGEMENT POLICIES, PROBLEMS AND SOLUTIONS

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League of Municipalities – November 18, 2009

Woodbridge Township Municipal Government

- ❑ Over 100,000 residents / 5th largest muni in state
- ❑ 1000 employees
- ❑ 7 dept., 37 divisions – 27 sq. miles – 30 locations
- ❑ 500 users (municipal) / 5000 users (school district)
- ❑ 600 e-mail users (municipal)
- ❑ 40 Blackberry users
- ❑ Network Operation Center – 70 servers
- ❑ Staff of 8 (Admin, network, techs, prog, helpdesk)
(3 Staff Members shared service w/school district)
- ❑ # of e-mails a month: 1.4 million messages
- ❑ # of spam a month: 80% / # viruses a month: 3%

EMAIL RETENTION AND DOCUMENT MANAGEMENT POLICIES, PROBLEMS AND SOLUTIONS



- February 2009 – NJ GMIS/League of Municipalities (PNC/Burlington) – Challenge of Managing E-mail (follow up from this session)
- One size does not fit all
- Here is a solution for larger enterprise organization

Woodbridge environment - with own mail server



Our system:

- ❑ Microsoft Exchange 2007
- ❑ Mimosa Email Archiving and eDiscovery
- ❑ Blackberry Enterprise Server
- ❑ Backup Exec
- ❑ Symantec mail gateway

Architecture



- ❑ Exchange: Windows Server 2003, Data stored on a Storage Area Network
- ❑ Mimoso: dedicated server. Data stored on a Storage Area Network, utilizes SQL database for metadata
- ❑ Blackberry Enterprise Server: dedicated server.
- ❑ Backup Exec (as it relates to Exchange): Client installed on Exchange Server
- ❑ Mail Gateway: Symantec appliance

E-mail policies – What We Do



- Retention:
 - 3 year retention policy
- Exchange- All mail removed via a program/script that speaks back to policies on the Exchange server.
- Mimosa-Policy started by scheduling a job to remove mail.

E-Discovery/OPRA what we do



- Information Systems can assign users ability to search all mailboxes via a client that is installed only on their computers and they can do keyword, user, date searches. This produces a list of emails from which they can go through and sort/remove any irrelevant emails. The searches can be names and called up in the future if necessary. This would be what we would use for an OPRA search.

Shout outs



- Dyntek
- Mimosa
- Microsoft
- Verizon Wireless / Blackberry
- Dell
- New Jersey GMIS Board
- Beth Schreier, mail administrator Woodbridge



- NJ GMIS organization dedicated to gov tech
- Members-only list serv
- Chapter of GMIS International
- Annual fee to join GMIS based on tech budget.
- NJ GMIS holds statewide/regional meetings
- Join, go to www.gmis.org NJ Chapter: www.njgmis.org
- We need you events in your area & sessions like this
- **SAVE THE DATE: Wed. 4/21/2010 at The Palace in Somerset – 1st Annual NJ GMIS Learn Tech Education Conference**



Questions ?

Low-Budget Email Archiving with Microsoft Journaling

presented by

Walter C. Hansen

November 18, 2009



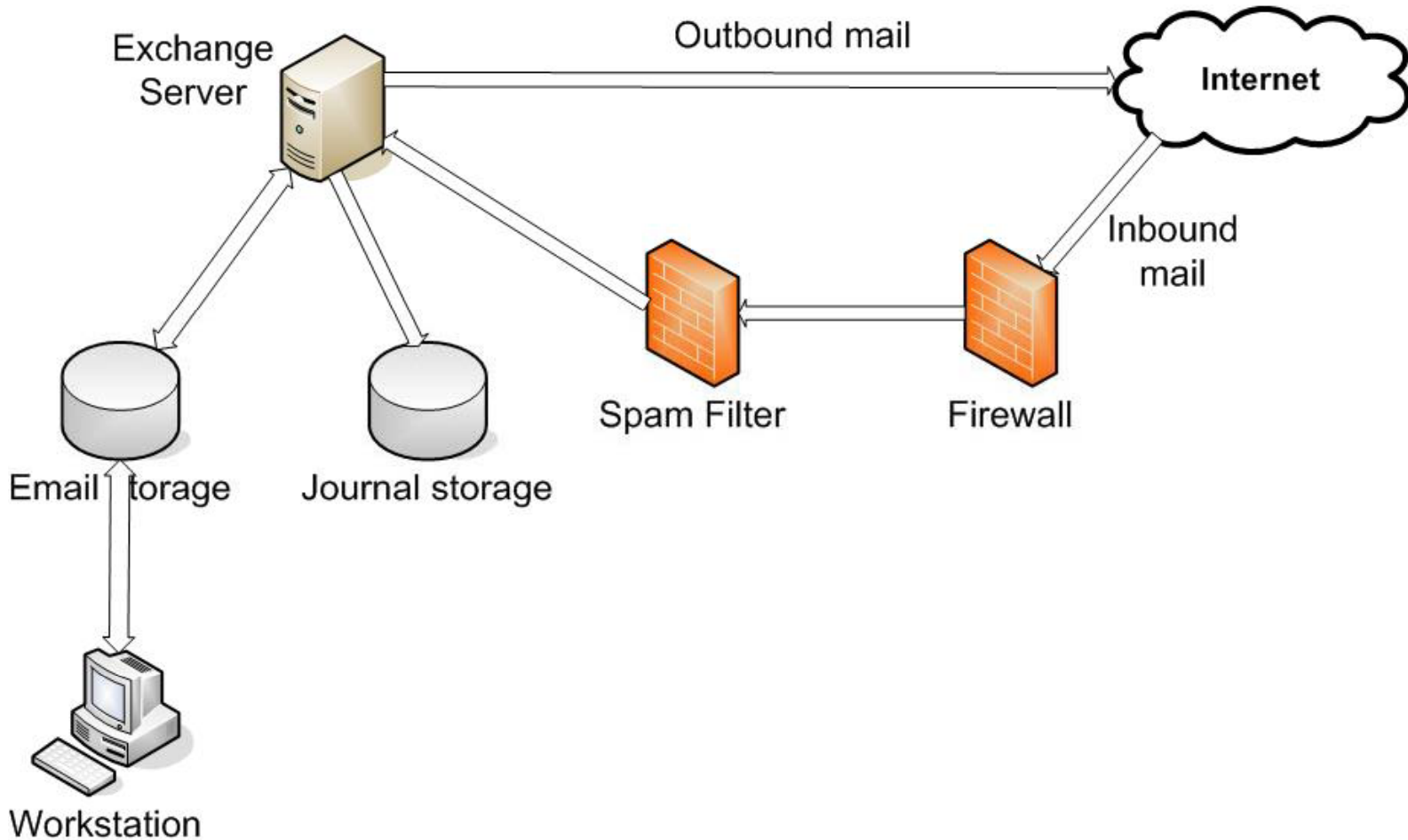
This low-cost solution will

- Utilize Microsoft **Journaling** to
- Automatically **capture** all email messages
- Enable the **retention** of messages
- Provide **retrieval** capability for messages
- Attempt to **satisfy** DARM requirements

Microsoft Journaling

- Is **included** in Microsoft Exchange Server
- Creates **copies** all in/outbound email
- Is **not** the same as email archiving
- Serves as the **first step** in archiving email

Message flow diagram



Three types of Journaling are

- **Standard**
Copies only the message & from/to addresses
- **BCC**
Copies message & all specific addresses
- **Envelope**
Copies the above plus actual recipients

You will need

- Microsoft **Exchange** Server
 - Versions 2000 SP2 and newer
 - Journaling Advance Configuration tool
- Additional **hardware** (maybe)
 - Storage capacity
 - Memory upgrade
 - Additional processor

To setup Journaling

- Identify what **mailboxes** will get journalized
- Create the **target** storage mailbox
- Create Journaling **rules** (2007, 2010)
- Enable **Journaling** within Exchange
- Enable **Envelope** Journaling (if desired)

Security, Backup and Archiving

- Journalized messages are **live** data
- Messages require **backup** while on the server
- Create **archive** copies
 - Export to PST
 - Burn to CDs
- **Delete** from server

Message retrieval

- Use Outlook to access messages on the server
- Use Outlook to access archived messages stored on CDs

The Journaling downside

- It is a **brute force** approach – copy all-or-nothing
- Very **rudimentary** search capability
- There is **no date-based** message retention capability

What about Exchange 2007?

- Exchange 2000 & 2003 are the **same**
- Exchange **2007** has more features
 - Rules
 - Smart folders
 - More control

What about Exchange 2010?

- Administrators can do **selective** Journaling
- Employees can utilize **personal** archiving
- Managers can define **retention** policies
- Researchers can do **multi-mailbox** searches

Questions/Links

- Email: mgmt@atoncomputing.com
- Phone: 908-725-3700
- Go to Microsoft.com for more Journaling info
- <http://search.microsoft.com/results.aspx?form=MSHOME&mkt=en-US&setlang=en-US&q=journaling>

A photograph of a street signpost with two signs. The top sign is dark green with white text that reads 'F-MAIL RETENTION'. The bottom sign is teal with white text that reads 'DOCUMENT MGT POLICIES'. The signpost is set against a background of green trees.

F-MAIL RETENTION

DOCUMENT MGT POLICIES

**Problems
and
Solutions**

SETTING THE TABLE . . .

- Are records in electronic format considered public records?
- What about e-mail?
- What governs retention of e-mail and e-records?
- Categories of e-mail
- Managing e-mail according to state records retention schedules: It's not easy!



**Q: ARE RECORDS IN ELECTRONIC FORMAT
CONSIDERED PUBLIC RECORDS?**

A: YES. All electronic records produced by public agencies—whether born-digital or scanned to images:

- **meet the definition of public record in N.J.S.A. Title 47:3-16**
- **are disclosable under OPRA**
- **are subject to e-discovery**



Q: WHAT ABOUT E-MAIL?

A: In general, e-mail should be considered correspondence, and retained in accordance with applicable records retention periods.

DARM and the State Records Committee have issued Circular Letter 03-10-ST to provide government agencies guidance in classifying and retaining different types of e-mail.

The Star-Ledger

Officials must think first before they delete

Many are unaware e-mails are records

Wednesday, October 24, 2007
BY JULIE O'CONNOR
Star-Ledger Staff

In this electronic age, a public document can be destroyed with just one click. Like a copy of the e-mail ***** of the ***** Township Committee recently tried sending to ***** County Freeholder Director ***** , the town's former mayor.

The e-mail bounced back because the address was incorrect. But had it been delivered, ***** would have accidentally violated the state's record-keeping policy soon afterward.

"I would have deleted that e-mail, not knowing I was supposed to keep it," he said.

Hundreds of other New Jersey municipal officials are also struggling with state regulations on e-mails that discuss official business -- rules adopted five [now seven] years ago.

After all that time, many public officials still don't know e-mail guidelines even exist.

WHAT GOVERNS RETENTION OF E-MAIL AND E-RECORDS?

http://www.njarchives.org/links/pdf/m100000-905.pdf - Windows Internet Explorer provided by New Jersey Department of State

http://www.njarchives.org/links/pdf/m100000-905.pdf

File Edit Go To Favorites Help

http://www.njarchives.or... X Government Records Council...

20 (21 of 27) 75% Find

0502-0002	Agency-Sponsored Seminar – Printed Materials (Copy)	Periodic review		Destroy
0502-0003	Agency-Sponsored Seminar – Correspondence and Work papers	3 yrs		Destroy
0503-0000	Correspondence (E-mail or Hardcopy)			
0503-0001	Correspondence - General External	3 yrs		Destroy
0503-0002	Correspondence – Administrative Internal	Periodic review		Destroy

DEPARTMENT OF STATE - DIVISION OF ARCHIVES & RECORDS MANAGEMENT
FORM CR-AA-0004 (10/89)

LOCAL GOV'T GENERAL RETENTION SCHEDULE

RECORDS RETENTION AND DISPOSITION SCHEDULE		AGENCY #	SCHEDULE #	PAGE #
		M100000	905	20 OF 26
RECORDS SERIES #	RECORD TITLE & DESCRIPTION	RETAIN IN		DISPOSITION
		AGENCY	RECORDS CENTER	
0504-0000	Executive Administrative Subject File Subject file of a Mayor, County Executive, Administrator, County Manager, or equivalent authority dealing with all administrative aspects of their offices.			

circular-letter-03-10-st.html

NJDARM: Circular Letter ... X http://www.monumentalcity... http://www.njaspa.org/AGA...

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Circular Letter 03-10-ST: Managing Electronic Mail: Guidelines & Best Practices

EFFECTIVE DATE: 7 July 2002

ATTENTION: Heads of State and Local Government Agencies

SUBJECT: Managing Electronic Mail: Guidelines & Best Practices

EXPIRATION DATE: Indefinite

INFORMATION: Albin Wagner, Chief of Records Management, 609.530.3204

For Printer Friendly Versions Click Here: [\[PDF\]](#) [\[MSWord\]](#)

1.0 Managing Electronic Mail: Guidelines

- [1.1 Intent and Purpose](#)
- [1.2 Introduction](#)
- [1.3 Definitions](#)
 - [1.3.1 E-mail system](#)
 - [1.3.2 E-mail messages](#)
- [1.4 Legal Requirements](#)

CATEGORIES OF E-MAIL

- **Non-Record E-mail** (personal correspondence, spam, listserv messages, non-governmental publications)
- **Official Record E-mail** (meets the public records definition in Title 47:3-16)
- **3 subcategories of Official Record E-mail:**
 - **Transient documents** – limited administrative value, such as meeting notices
 - **Intermediate documents** – some administrative value, such as non-policy-related general correspondence, internal communications, meeting notes
 - **Permanent documents** – executive correspondence of agency heads, departmental policies, board and commission minutes

**MANAGING E-MAIL ACCORDING TO STATE
RECORDS RETENTION SCHEDULES . . .**



. . . IT'S NOT EASY!

FOR



CONTACT

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