Email/Messaging and Calendaring

Phase 2
Product Selection

Recommendation Summary from Phase I

- Move to a common underlying technology for all UNM units
- Build an infrastructure that enables distributed flexibility, control and added value
- Continue the collaborative process to:
  - Investigate the tool set options to improve UNM communication
    - Complete an RFP for messaging/calendaring for UNM
    - Include community in selection (including faculty)
  - Develop a campus-wide implementation approach
    - Understand dependencies and required resource alignments
    - Develop multiple implementation scenarios
    - Develop cost models
    - Scope of implementation should include all campus and affiliated users
    - Develop a time table... accelerated with executive support, implementations from Fall ’11 through Fall ’12
  - Form Governance to oversee/support Program
Phase 2 Approach

• Core Team Formed
  – Faculty, Staff and IT
  – Meets every Tuesday 8:00 AM, 933 Bradbury
    • Moira Gerety, UNM IT
    • Mike Campbell, UNMH IT
    • Steve Spence, UNM IT
    • Tom Sanford, HSC IT
    • Dilek Inal, UNM IT
    • Robert Christner, Accessibility Services
    • Rebecca Lubas, University Libraries
    • Kristin Umland, Faculty, Mathematics and Statistics
    • Nancy Jost, Clinician, UNMMG
    • Dale Hendrickson, University Libraries
    • Barbara Schaeffer, Linguistics

Moira Gerety and Mike Campbell, EMCTF
Phase 2

Phase 2 Approach

• Advisory Team formed
  – Faculty, Staff and IT
  – Help communicate and discuss issues that arise
    • Anne Murray, Legal
    • Carol A. Parker, Law School
    • Cinnamon Blair, UCAM
    • Cuitlauac Joaquin Cantu, Los Alamos I
    • Dale Hendrickson, University Libraries
    • Jeddediah Crandall, Faculty, Computer Science
    • Jennie Wong, IT, Business Services
    • Karl Benedict (Cannot participate), Director of ECAD
    • Kenedi Pollard, HSC Executive Offices
    • Kevin Stephensen, Office of the VP for Research
    • Linda Pardo, HSC Financial Services
    • Lisa Marbury, Institutional Support Services
    • Manu Patel, Internal Audit
    • Mary Ann Castillo, Valencia
    • Michele Hurley, HR
    • Rob Del Campo, Faculty, ASM
    • Ron Margolis, UNMH
    • William Gilson, Los Alamos

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Phase 2
Phase 2 Status

- Current State documents are being finalized
- Scope of conversions being identified
  - Which of the 30 some email systems will migrate now, migrate on implementation, or not migrate at all (teaching and research)
- Requirements are being developed
- Outline of the RFP is started

RFP Mandatory Requirements

- Solution must
  - Be in the top 5 of market share
  - Allow departmental branding (salud/cs/law.unm.edu)
  - Must allow departmental administration (still being defined)
  - Must support most 90% of the mobile device market
  - Must support most common desktop mail clients
  - Must integrate with our directory infrastructure
    - Bid two ways: one AD, or two
- Service provider must have experience with migrating IHEs > 20K students and Hospitals with > 400 beds
- Must present a viable implementation strategy that takes HSC requirements into account
  - Must cost HSC work separately
- Implementation must meet security requirements
  - HIPAA & Ferpa
  - Records retention/archiving
  - Privacy
RFP Scope of Work

1. Recommended Architecture/Design
   1. Bid 2 ways: if 1 AD or if 2 AD’s
   2. Can be a blend of hosted/local
2. Platform specification/build
3. Migration proposal
4. Training and Support

RFP Other Requirements

• Features and capabilities for email, calendar, messaging and other (25 “questions”)
• Authentication and directory integration (6)
• Integration and 3rd party access (9)
• Migration tools (5)
RFP Items Under Discussion

• Do we list specific integrations we want?
• ADA compatibility
• Integration with our phone switch?
• Do we want to have the vendor build any local infrastructure?
• Assumption of migrations: Communicate, 3 Groupwise, 2 Exchange, ..... 
• Any other HSC specific requirements?
• How we handle document libraries?

RFP Scoring

• (Must meet mandatory requirements)
• Overall architecture
• Platform
• Migration
• Training and Support
• Vendor Qualifications and experience
• Solution roadmap
• References
• Interview/oral presentation (of finalists)
• Cost
Comments/Questions

• The RFP is not specs---
  – We will give a good description of current state
  – We will write a solid summary of our objectives
  – Then we see how well the vendor proposes a solution that makes sense to us

• As we finalize the document, we will circulate for your review

• Discussion (cloud, in particular)