

April 2004

## Microsoft Outlook Pilot Project

In December 2003, Legislative Council information technology staff implemented a Microsoft Outlook e-mail pilot project with 12 legislators participating. Members of the pilot project included senators and representatives from both parties.

A class on how to use Microsoft Outlook 2003 was offered to participants. As an alternative, participants could elect to use the 35-page "Testing Checklist/Quick Reference" booklet to learn the features of Microsoft Outlook 2003. Of the 12 participants, 7 chose to use the booklet in lieu of training. Those seven made 35 calls for support compared to 8 calls from the participants who took the training.

"Tips for Today" which answered questions or explained Microsoft Outlook 2003 features also frequently were e-mailed to participants.

### Legislator Evaluation Checklist

Legislative Council information technology staff provided participants with a 36-page test checklist that included quick reference instructions. Five of the 12 participants completed and returned the checklist. Generally the checklists were completed with the "date completed" for each feature. Additional comments from legislators included:

- Needs to add spell check
- Wants to choose a default list for forwarding e-mail
- "Cool" referring to Add to Outlook Contacts feature
- Liked the ability to create a distribution list in the Contact Address book
- Look into auto schedule of meetings?
- Especially like having a second chance to reconsider deletion!
- Prefer Auto Preview on
- Attachments extremely slow to open on 56K
- Distribution list may be valuable during session
- "Handy" referring to Find Messages feature

(The features noted above are features of Lotus Notes.)

### Effects Of Migration To Microsoft Outlook 2003

#### INTERIM MEETING MATERIALS

- **In Lotus Notes**, meeting notices are sent to legislators via e-mail. Legislators accept or decline the meeting. If the meeting is accepted, the meeting is automatically added to the legislator's calendar. Whether a meeting is accepted or declined, a notice is sent to the Legislative Council staff regarding attendance which is used in determining if a quorum will be in attendance. After replication, the meeting information resides on the legislator's laptop. Meeting notices contain a link to the Internet version for iNotes users.

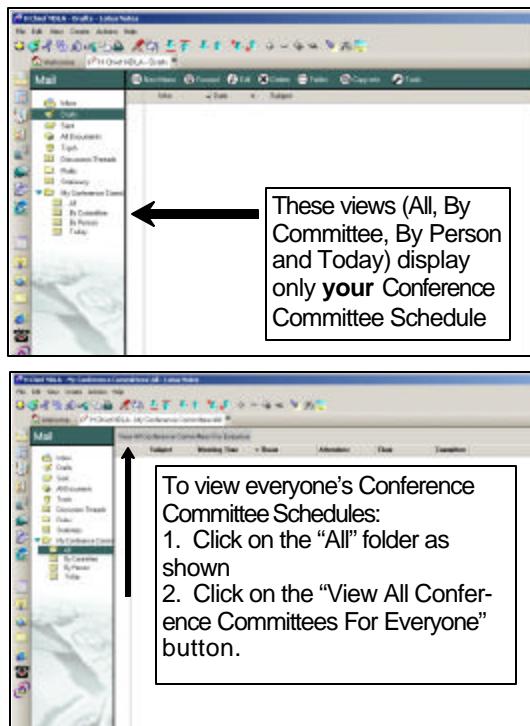
Committee minutes are also replicated (copied) to the legislator's laptop and are available at all times.

- In Microsoft Outlook 2003, meeting notices are sent to legislators via e-mail with a link to the notice on the Internet. Legislators do not have to accept or decline. Legislators themselves must add the meeting to their calendars. Legislative Council staff is not notified regarding attendance.

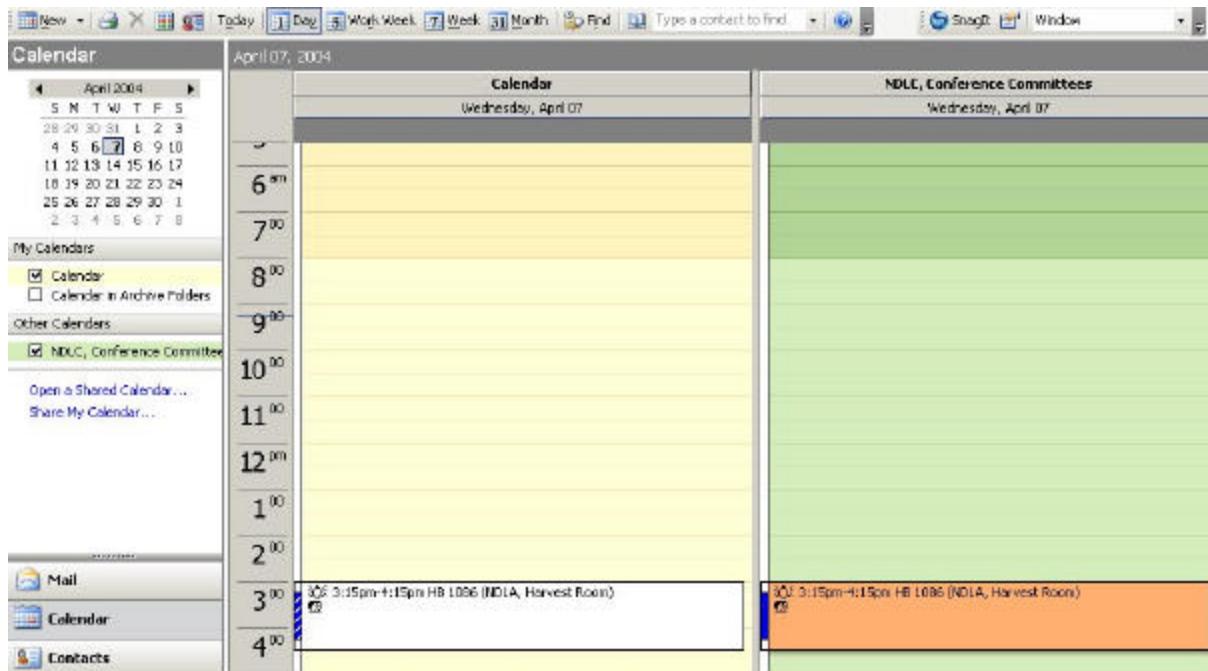
Committee minutes are available on the Internet only while the legislator is connected.

**CONFERENCE COMMITTEE SCHEDULING** - Conference committees are scheduled by the assistant to the House Majority Leader. Conference committees are displayed on the hall monitors and are available on the Internet as soon as they are scheduled.

- In Lotus Notes, when conference committee members are invited, the automatic acceptance (Auto Accept) feature, which has been programmed to "auto accept" only invitations from the assistant, puts the meeting on the conferees' calendars which then blocks out that time. Members can click on "My Conference Committees" in Lotus Notes to see conference committees by "All," "By Committee," "By Person", or "Today". The chair and meeting room information is displayed also. (This information also would have been added to the LAWS system if the Microsoft Outlook pilot project had not been initiated.)



- In Microsoft Outlook 2003, if the "auto accept" feature is activated, anyone on the state network with Microsoft Outlook can tentatively schedule a meeting with a legislator. The meeting then is placed in a legislator's calendar as "Tentative". This is necessary so that more meetings can be scheduled by the assistant. Otherwise, no more meetings could be scheduled until all conferees manually "accepted" the meeting. A shared calendar will allow legislators to view the conference committees that have been scheduled. A shared calendar in Microsoft Outlook 2003 will appear as follows:



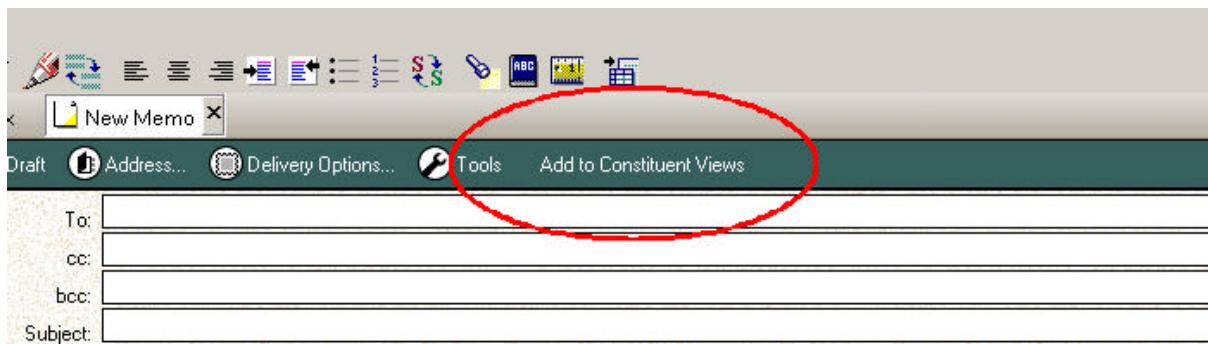
## **Estimated Conversion Costs for the Conference Committee System**

The estimated cost to develop the interfaces between Microsoft Outlook 2003 and the Internet and the hall monitors is \$1,970.00 and would require approximately one-month development time. (Appendix A)

The estimated cost to provide the same conference committee features in Microsoft Outlook 2003 as are presently available in Lotus Notes is \$26,652.50 (renamed the Mail Templates application - Appendix B - page 3).

**TELEPHONE MESSAGE SYSTEM - In Lotus Notes**, the telephone message system consists of an “Add to Constituent Views” component and a “Telephone Message Notification” component.

- **Add to Constituent Views - In Lotus Notes**, when a legislator receives an e-mail message that he or she wants added to the Constituent Information in LAWS, the legislator clicks the “Add to Constituent Views” button on the Lotus Notes task bar:



This automatically forwards the e-mail message to the telephone room staff. The telephone room staff verifies that the message is from the legislator's constituent and then updates Constituent Information in LAWS.

**In Microsoft Outlook 2003**, an e-mail address for the telephone room supervisor will be provided during LAWS training so that the e-mail can be forwarded to the telephone room for verification and updating LAWS.

- **Telephone Message Notification** - Originally, paper telephone messages were delivered to legislators who taped them to bills in bill books or otherwise dealt with them. When LAWS was developed, telephone messages were routed to the Constituent Messages database. When legislators want to see their telephone messages, they open "Today's Messages" in the LAWS Constituent Information option.

Legislators requested that they receive notification when they had new telephone messages because they found that they sometimes missed responding to telephone calls in a timely manner. They also wanted to respond to telephone messages by e-mail when e-mail addresses were available and not have to key the e-mail addresses. To implement these requests, a telephone icon was added to the Lotus Notes template and e-mail addresses were added to the information gathered by the telephone room staff.



When legislators click on the telephone icon, they are able to access both "Reviewed" and "Unreviewed" telephone messages.

A screenshot of the "Phone Messages" interface in the LAWS system. The window title is "Phone Messages". On the left, there is a sidebar with buttons for "Unreviewed Messages" and "Reviewed Messages". The main area contains a table with columns: "Stat.", "Caller", "City", "Date &amp; Time", and "Message". At the top of the main area, there are several buttons: "View New Msgs", "Edit Document", "Mark as Reviewed", "Mark for Delete", and others. The "Mark as Reviewed" button is highlighted with a green checkmark icon.

	Stat.	Caller	City	Date & Time	Message
▼	X	Rick		01/13/2003 12:21:41 PM	Please call - - Please contact him about p pm is the Banquet and 7:30 pm the Panel b
	X	Mary	Fargo	01/14/2003 10:50:11 AM	Please call - - Please call re: Hs Bill 1182
	X	Jeff		01/14/2003 01:30:14 PM	Please call - - Please call regarding huntir
	X	Pat	Bismarck	01/14/2003 02:40:29 PM	Please call - - HB 1190 moved from IBL to
	X	Shane	Fargo	01/23/2003 01:39:49 PM	- Strongly disagrees with the limitation of p
	X	John	Bremen	01/24/2003 09:14:35 AM	- Concerning HB1389 I urge consideration are as good today as when State Board of producer and research and the incentive to

In addition, when a new telephone message comes for a legislator, a popup window informs the legislator that the legislator has a new telephone message. (In practice, some liked this feature and some did not, particularly those who received many telephone messages and had to close the popup window many times to account for each message. Developing a single popup window was to have been done this interim if the Microsoft Outlook 2003 pilot project had not been initiated.)

### **Estimated Conversion Costs for the Telephone Message Notification System**

The Information Technology Department estimates the cost for developing a Telephone Message Notification System in Microsoft Outlook 2003 at \$54,073.75 and would require approximately four months' development time. (Appendix A)

### **Information Technology Department Recommendations**

The Information Technology Department has recommended migration to Microsoft Outlook 2003 so that the Legislative Assembly conforms to the Office Automation Domain Team policy of the Information Technology Department's Enterprise Architecture Initiatives.

The Information Technology Department staff verbally has recommended that as little customization as possible be done with Microsoft Outlook 2003 to facilitate future upgrades.

### **E-mail Migration Proposal**

If a decision is made to migrate from Lotus Notes e-mail to Microsoft Outlook 2003 e-mail, the most immediate need is to develop conference committee interfaces with the Internet and the hall monitor displays at an estimated cost of \$1,970, pending the results of the Legislative Council's Infrastructure Analysis.

If migration is made to Microsoft Outlook 2003 e-mail, it is strongly urged that legislators attend a class in the use of Microsoft Outlook 2003 so that they become informed of the features of Microsoft Outlook 2003.