



# Indiana Public Defender Council

To: IPDC Board of Directors  
Date: June 25, 2020  
Re: Recommended solutions for Listserv decommissioning

Indiana's Office of Technology (IOT) has announced that will decommission all state listserv email services on September 15, 2020. IPDC currently hosts the following listserv email groups: (1) Defendnet; (2) PDC-Legislation; (3) Appealnet; (4) Jdlaw; (5) Tprlaw; (6) Dnadefense; (7) Jdlaw; (8) Lifeforce; (9) Icda (Chief Public Defenders); and (10) Padmin.

Two solutions have been identified as a replacement for the various IPDC Listserv email groups:

- a) Chatter—Salesforce
- b) Microsoft Teams.

IPDC staff recommends that all email listserv functions be moved to Salesforce, using the Chatter function within Salesforce. The justification for this recommendation is at the end of the memorandum. Below is a brief description of the functionality of both solutions.

**1. Both MS Teams and Salesforce (Chatter) allow members to send and receive messages using traditional email services.**

Both Teams and Salesforce—Chatter work similarly to the current listserv email distribution service. Both allow for messages to be sent and received through traditional email. The change would only be the email address for the email distribution group.

**2. Both MS Teams and Salesforce (Chatter) allow for enhanced collaboration through discussion threads.**

Both Teams and Salesforce—Chatter both allow members to collaborate through discussion threads, in the same manner as other online discussion groups like Twitter, Discord, Slack, etc. This function is much like a group chat application. Members may log into either Teams or Salesforce and read and respond to messages in chat threads rather than through individual emails. Members can choose which threads to follow and reply. Members may also choose to reply only to the sender of the original message, to a subgroup or to the entire group. Many members will prefer this function over receiving and replying through traditional email.

**3. Both MS Teams and Salesforce (Chatter) include a secure email server.**

Both Teams and Salesforce include the necessary security features to prevent access from non-vetted individuals. Messages are stored on a secured server and accessible only to members of the group. MS Teams may require some members to electronically acknowledge the State's Information Resources Use Agreement (IRUA), which establishes appropriate and inappropriate

uses of the technology and other requirements to use Teams. IPDC is currently using MS Teams internally meaning IPDC is already in compliance with the State's IRUA. Members who are not state employees may be required to adhere to IRUA with respect to appropriate and inappropriate use of Teams.

#### **4. Both MS Teams and Salesforce (Chatter) allow for shared document libraries:**

Both solutions allow store files shared with the group to a shared document library. Members who share files in MS Teams will pin the file to a message. In Salesforce, all files attached to an email or pinned to a chat are automatically saved. The advantage to members of having a shared document library is that members may search only the documents in the folder rather than searching through an email server for an email to which a file is attached. Files are stores separate from the message in a searchable format.

#### **5. Why Salesforce (Chatter) over MS Teams?**

For the most part, both solutions will allow us to move the listservs to an email distribution group that will look very similar to the current listservs with some enhanced functionality. Both solutions will not result in additional costs to the Council. The Chatter function in Salesforce is the recommend solution for the following reasons:

- All documents shared by members are saved atomically to a shared document library in Salesforce. This function will happen when a document is shared via email to the group or when pinned to a message on the distribution chat. MS Teams only stores shared documents when they are pinned to a message. Many members will likely not use the distribution online chat, preferring to use traditional email.
- IPDC is moving membership services to Salesforce. Members will be able to log in and access all IPDC materials through Salesforce;
- Shared documents will be included in a global search by members. For example, if a members globally searches for "Motion to Suppress," the search will result in results from the Motions bank, IPDC Manuals, the Case Bank and documents with the same name that has been shared by members. Searches are bullion searches
- Single sign-on, if members choose to interface with the distribution group, they will have one username and passwords with Salesforce. With MS Teams, members would have different accounts, one with Salesforce and one with MS Teams.
- Chatter is included with our current license for the Salesforce Community.