

Moving your office phone system to the cloud

Voice over Internet Phonecalls (VoIP) can offer more flexible ways of working and save money. Lasa's Tim Watkins-Idle explains the stages involved in Lasa's recent move to VoIP.

Many large organisations have switched their telephone systems to the cloud in the last few years, using Voice over Internet Protocol (VoIP) technology. There are major cost savings, with free calls to and from different sites within the organisation, and lower line rental. However, it is complex and, for smaller organisations without expertise, can be an intimidating step to take.

The good news is that for a medium sized organisation, the technology (hosted VoIP - there is no need for a phone switch in the office) is now mature enough to work reliably and will almost certainly save a lot of money

It is made more intimidating by the amount of jargon, and my experience is that telephone engineers are even worse about explaining things in plain English than computer engineers. There are some useful glossaries on the web: <http://bit.ly/iiX3He>

Why move to the cloud?

Lasa had a telephone system which

was using an ISDN line 30, but we were only using a small percentage of its capacity, and had to pay a significant line rental charge.

Other drivers for change included the fact that parts of our existing system was 20 years old. Toshiba had made it very well, but it had long exceeded its design life and had not been supported by the manufacturer for many years. We had a supplier who did support it, but at a cost, and any changes needed a technician to do some programming. The system's environmental credentials were very poor as it needed an old PC to run voicemail, with the whole system using about 300 watts all day every day.

What we wanted

We wanted to save money and energy with a new system, and were also interested in the ability to integrate calls between staff in the office and those working remotely. Rather less significantly, we were interested in the ability to click on a number on our computer screen and make a call

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Lasa has been providing the voluntary and community sector with high quality and impartial ICT advice since 1984.



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editorial

Ch ch ch ch changes

Earlier this year, Computanews ran a readership survey. Amazingly, it was the first survey we'd ran since 2003. We'd realised that, apart from moving away from a print version to the current pdf download back in 2008, Lasa has been producing Computanews in a similar way for over 25 years. Your hard working editors had been thinking about how to use the latest technologies in the most efficient way to deliver the content of Computanews to you, our readers, whilst also keeping the spirit, if not the old format, of Computanews alive.

In summary, we found:

- **Readership** - There was a roughly equal split of readership between one to five years and five or more years, with a small minority of less than one year.
- **Articles liked** - Technical advice and tips came out top of the articles, with book reviews and conference reports less popular.
- **About Computanews** - Most respondents agreed that Computanews helped them to keep up to date with technology.
- **Printing, Format and Frequency** - Surprisingly nearly half of the respondents never print it out, 40% occasionally and only 1.5% always printing it which led us to conclude that a quarterly web only publication would be welcomed by readers.
- **Publications read** - Respondents mentioned a wide range of (on and offline) publications, websites, mailing lists and bulletins. PC Pro was the most popular "traditional" magazine, followed by Civil Society IT.

So... we have decided to be radical and move Computanews, like the ICT e-bulletin, to an online-only format from the next issue. In the past, we've archived certain articles on the knowledgebase following their publication in Computanews. In future, everything will be on the knowledgebase as individual articles with a single editorial page which will provide brief details of what's in this quarter's "issue". This will mean that we're able to archive all the articles and that you, dear reader, will have the opportunity to comment on articles. Similar to the ICT e-bulletin, which will still be published monthly, we'll be able to embed more online content and make it easier to link to related sources.

Meanwhile, in this old-fangled issue, Tim Watkins-Idle recounts his experiences of moving Lasa to a VoIP phone system, Sarah Lord Soares updates us on circuit riding, the UKRiders examine email archiving, Mark McLean invites London-based groups to apply for some technology consultancy and Simon Davey reviews a new book on buying a database. And as always, thank you to our regular contributors. We hope you enjoy reading it.

Ian Runeckles and Miles Maier, Lasa, May 2011

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Computanews is a specialised magazine covering the use of technology within the voluntary sector. It has a key audience of:

- organisation managers and trustees
- staff responsible for their own organisation's technology
- Circuit Riders who provide advice and technology support to other organisations

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The circulation of Computanews is currently around 2,500 copies per issue, distributed 4 times a year. We anticipate that the circulation will increase now that it is available as a free, downloadable file. To place an advert, or for more details about rates and dates, email: computanews@lasa.org.uk or phone: 020 7426 4473

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without having to dial the number.

What we considered

Before actually doing anything we consulted with staff about what they wanted, and used this to inform decisions about what would help them achieve this. We also spent a lot of time looking at the technical options - there has been a lot of talk about VoIP for some years, but it's a rapidly-evolving technology.

A new conventional system would have been more expensive to install than VoIP because of the need for a new internal switch - with hosted VoIP this is included in the line rental for a minimal fee. Handsets and installation costs are generally similar, as is the hassle and complexity of learning a new system, but a new conventional system would have much higher recurring costs.

Call quality is not as guaranteed as with a conventional system. Because the call is routed through the internet rather than through dedicated telephone wiring, there is a greater potential for things to go wrong. In practice, however, the number of poor quality calls is said to be very small indeed, and that has been our experience. In some contexts, it may be that even a very small number of poor quality calls is not acceptable, but we decided that this was something we could live with, particularly given that with the increased use of mobile phones, some calls are of very low quality anyway.

To improve the odds in terms of call quality, there are two things which can be done. First is to use QoS (Quality of Service) technology in switches and routers.

This prioritises data containing telephone calls above other sorts of data - very useful if colleagues are using YouTube or other streaming services, for example. The second is a dedicated broadband line for the VoIP traffic. One call uses about 80kb, both up as well as down. We considered that we had enough existing capacity to handle the additional traffic, and ofcourse, it's always possible to add more broadband capacity later.

Resilience is a significant consideration. If there's a power cut, all telephone switches fail, so there's a good case for a keeping a basic handset somewhere in the office on a standard BT line. With VoIP, if the internet goes, then so do the phones, but (I know this is a big generalisation) internet connections are more reliable now than five years ago. We have two broadband lines with different suppliers, so that if one goes down we can use the other, although this is more complex than it sounds.

What we did

We were able to take advantage of a scheme run by The Helplines Association (www.helplines.org.uk/ - see article in this issue of Computanews) for some free consultancy. We used this to refine ideas about what would work best, to assess some quotes from suppliers, and to do some of the actual configuration and installation. This was very helpful, and saved hundreds of pounds.

The biggest expense was for new handsets - we bought them very cheaply from an independent supplier; the downside is that they're not as well supported, particularly regarding software for computer integration, but they

work fine.

Another potentially significant expense is a new network switch. This is generally necessary because VoIP phones need a power supply, which is best delivered by Power over Ethernet (PoE) and so you need a PoE switch. Otherwise, you need to buy power adaptors for each handset, which adds to the cost and to also the number of wires under everyone's desks. Eligible organisations can get very cheap Cisco switches through the technology donation programme administered by CTX (<http://www.ctxchange.org/>) as we did.

The system is managed (as all hosted VoIP systems are) by a "powerful" - but complicated - web-based console, which can do all sorts of things, most of which we don't need - at least yet. A large amount of time has to be spent learning how to use it. Some users just want to dial numbers and others love the techie stuff- one of my colleagues was, very rapidly, making VoIP calls on our system via an app on his iPhone. Different sets of instructions for different users are helpful.

What we have spent, and what we have gained

A lot of the phone budget isn't affected by the change - the bills for mobile internet, broadband and the odd analogue line continue as they were. I think that there will be a small saving on call charges, but it will be minimal. However, we were paying over £600 per year to maintain the old system. Now system maintenance is included in the monthly hosting charge and if a handset breaks we will have to get another one. The other major

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saving is of £1,000 per annum for line rental.

We'll also save around £200 per year in electricity as the new system uses very little power. The cost of the move to VoIP was a little over £2,500, so it will pay for itself in less than two years. It's worth noting that without the free consultancy, we would probably have spent another £1,000 or so on the installation, configuration and training on the new system, and had we not been eligible for the CTX scheme we would also have needed to spend hundreds more on a new power over Ethernet switch.

We also have gained the ability to call and transfer calls from the office to staff outside seamlessly, whether it's to someone working at home or even if they're out and about, when their iPhone will take the call via a VoIP app. Some staff are also considering using the phone software on their PC and do away with their handset altogether. Software from 3CX seems to have all the functionality we require from a free software package, but it's early days, and call quality doesn't seem as good as from a handset.

Lessons learnt

Some analogue lines are still necessary, and they may be mixed up with the old telephone cabling. A month after the transition, I removed the old ISDN cabinets and our analogue lines stopped working, so I had to call in BT, at some expense, to reconnect them. This is why there are odd bits of telecoms kit on the walls of all but the newest offices, as people generally don't take the risk of taking it out. The other option is to budget several hundred pounds for an engineer to come and remove all

the old wiring and equipment.

The transition can be more expensive than you expect with extra costs, such as new headsets, power adaptors for some of the phones which are not directly connected to the PoE switch, the disposal of old kit etc.

Make sure before you start that you know your contractual notice period to your existing supplier(s) - if your organisation has signed up to a one-year notice period this will significantly affect when you can think about the change.

Porting numbers from the old system to the new is supposed to be relatively straightforward, but tends not to be. It isn't always done on the day which is promised, and there is time- at least one hour, during office hours- when you are without any telephone connection at all. Ours were off for about two and a half hours. If telephones are essential to your operation, you will need to plan for this downtime.

One aspect of VoIP technology area which has yet to mature is that of computer-telephone integration (CTI). Currently there are a variety of applications which read telephone numbers and let you click on them to make a call through your phone, but they tend to be very hardware and software specific. The Telify add-on for Firefox (<https://addons.mozilla.org/en-US/firefox/addon/telify/>) works with some handsets. Other handsets also come with software add-ons for Microsoft Outlook so you can call

by clicking on a contact. Some are free downloads, but others are very expensive. In the future, I would hope for software for all makes of phone which reads numbers on all programs, but this is probably years away. I would be very happy to be proved wrong!

Conclusion

It's still early days here, but things are working fine so far. We have new kit which works fine, and our on-going costs are much lower. There have been some problems with poor call quality, and failure of calls to connect, but these are few and far between. Finally, should the need arise, it would be possible to switch to a new VoIP supplier - the equipment can all be reprogrammed to work with other systems with (it is said!) relatively little fuss.

About the author

Tim Watkins-Idle is an occasional contributor to Computanews and manages Lasa's IT infrastructure.



Helping hand for helplines



The Helplines Association has just commenced the third year of its City Bridge Trust funded programme to help charities make better use of helpline-type services. Mark McLean at THA looks back at some of the work done during the second year of the programme.

Many people think of helplines as being purely telephone based, but it can also include email, SMS text message and web based - and our City Bridge Trust funded project supports them all.

If you run a helpline service or are thinking of opening one, here are some varied examples of the work we've done, and we hope it will inspire you to try our funded consultancy work for your project.

Solace Women's Aid (www.solacewomensaid.org/) which provides a range of services to women and children experiencing domestic and sexual violence, has developed its service model to handle incoming calls, process referrals more efficiently and has introduced a more robust system for maintaining the content on its website

Birth Companions (www.birthcompanions.org.uk/) which

supports pregnant women who are in detention, has adopted a more sophisticated approach to the way it communicates different types of information to its members. In discussing our recommendations for improvements to its website, it has decided to review its overall branding and image and take steps to align these more fully to its current scope of activity.

Richmond AID (www.richmondaid.org.uk/) which supports people with disabilities and long-term conditions, has introduced a client management system which is estimated to reduce the time taken to collate reports by two weeks per year and to halve the time required for entering and searching for data.

London Voluntary Services Council (www.lvsc.org.uk/) which provides a voice for over 40,000 community and voluntary organisations in the capital, has undertaken a review of its website, established a new set

of requirements and commissioned a new supplier to design a new site and incorporate a content management system.

Contact THA

Places are still available on the 2011-12 programme - so if you have a project which serves people in part or all of London (but not beyond) then please drop Mark McLean a line on mark.mclean@helplines.org.uk

About THA

The Helplines Association (THA) is the membership and good practice organisation for email, SMS, internet and telephone-based helplines. THA promotes good practice by publishing guidelines, running a membership scheme, Helplines Standard, training and consultancy.

www.helplines.org.uk/

The Circuit Rider journey - hang up your spurs?

In January Lasa announced a Circuit Rider Survey to the almost 400 strong UKRiders mailing list. Having received only 32 responses, Sarah Lord Soares asks if this is an indicator of how our non-profit technology 'community' feels about Circuit Riding.

It's been a long ride. We've seen highs and lows in the funding environment which have carried the circuit rider far and wide but now it seems that perhaps the end is nigh. But, I should start more positively, right? Despite the now ubiquitous nature of technology, there are still small organisations who need support in 'making the right technology decision'. And there are still people out there who are working for the greater good, enabling these small groups to work with their communities by giving the best possible advice and support they can. Is it just that there isn't a common term we can use to unite us, reluctantly or otherwise?

The most popular understanding of Circuit Riding saw our way of operating with a strategic approach and not creating dependency as paramount. The question is whether this is sustainable in today's funding environment?

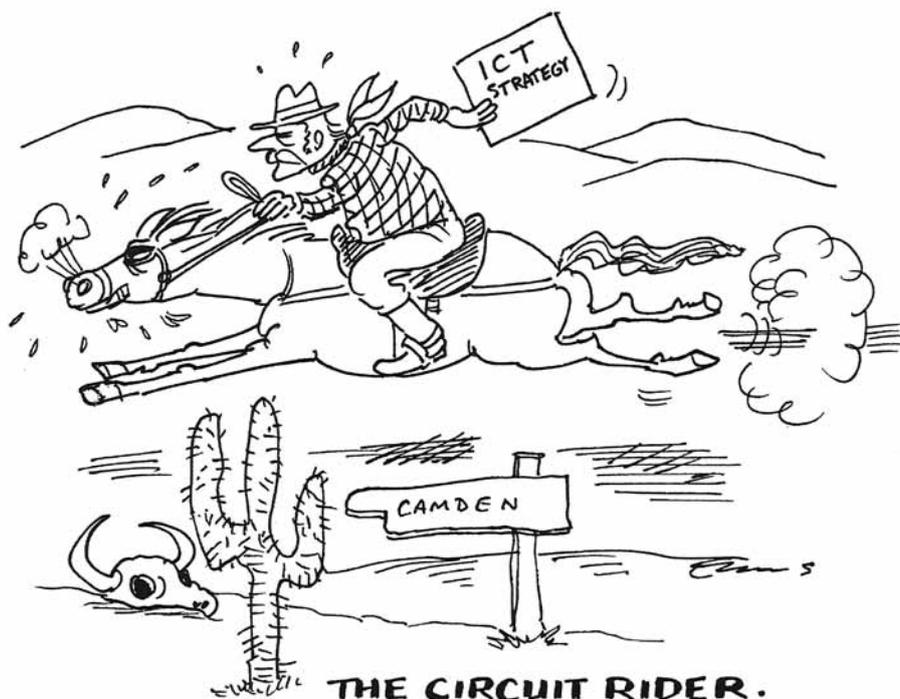
Fully funded strategic Circuit Rider projects are now few and far between so the pressure is on to find a balance that still supports planning for technology while offering more (financially) sustainable services.

Back in the day, Lasa's motivation in attempting to pull a 'community' together was to provide opportunities for sharing and learning and also influencing how funders allocated grant money for technology to organisations in the sector. The term Circuit Riders, a mobile worker who provides technology support and

development to a caseload of small third sector organisations and who works in collaboration with other circuit riders, which was in active use in the US, sounded appropriate and was adopted.

To further our aims, again borrowing from the US experience, the UKRiders list was born in 2003 and debate started almost immediately over the use of the term. Some agreed it was useful to have a 'collective' term but others felt it was too homogeneous or just disliked having a label. But it was always gratifying to see people that had been working away in isolation, suddenly say "Hey, that's what I do!" and get involved irrespective of the terminology.

Eight years ago, national funders Capacity Builders recognised the value in embedding planning for technology in the sector when they specifically asked for Circuit



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Rider projects across the regions. This was based on the first Lasa Circuit Rider project funded by the Big Lottery, and was a proven method that showed results by regular benchmarking throughout the two year project. Of course it wasn't all happy trails - working with the smallest groups threw up its own challenges not least when the key contact left with all the learning! However, once the ICT Hub adopted the term it became a 'household name' in the sector, and there was no going back.

The debate at that time was more about what range of support Circuit Riders should be offering not whether they should be offering them at all. A memorable event

been met. It was also commented on that an ICT provider wouldn't necessarily want to be associated with the often used "cowboy" imagery used by circuit riding, which has somewhat negative perceptions.

The Conferences over the years have attracted great interest by being specifically for not-for-profit technology people; there isn't anything else like it. Each year since 2004 we have put together an agenda that reflects the most pertinent technology and organisational issues and the peer involvement of the community in participating in and running sessions, debating and feeding back has always been great.

person or non-profit technologist. None of the suggestions were able to include the wide range of technology support offered to the sector by Riders from the strategic consultancy to the hands-on maintenance. Could it be that when we call ourselves an IT support worker we have to explain that we are also able to offer planning and training as part of our role?

What could our network offer subscribers in the future? Interestingly the specialist conference, opportunities to share knowledge, regional meetings and technology updates were all high up on the list of desirable service for the future. This adds to the

"It was also commented on that an ICT provider wouldn't necessarily want to be associated with the often used "cowboy" imagery used by circuit riding, which has somewhat negative perceptions."

in the East Region in 2006 for the ICT Hub programme argued whether Circuit Riders should be offering fundraising advice - it was agreed that if this advice was for technology then why not?

So, returning to our recent survey, what are the benefits to being part of the network? Overwhelmingly, with a 66% response, the highest rated answer was to 'share ideas and knowledge' among an established group of colleagues. Second was the opportunity the list offers for networking, relating to overcoming a sense of isolation that a number of the respondents feel. An original aim of the list was to reach those of us who weren't able to make face to face meetings because of location and budget so it was good to hear that this has

Developing a Circuit Rider training programme was first raised at the Conference in Birmingham in 2007; was there a need to develop the 'softer' skills of Circuit Riders? The Lottery Basis-funded Lasa ICT Learning Programme was the end result of this discussion. Relating this to the survey, a majority of the respondents, had already been working in the sector for between 7 and 11 years so perhaps felt that this sort of training was unnecessary?

From the survey replies it is clear that we are using interchangeable names depending on who we are talking to! Only three people said they called themselves Circuit Riders while nine people gave alternative suggestions such as Information Officer, IT support

evidence that there are common themes that we can be connecting through.

The upshot is that the use of the term 'Circuit Riders' may not describe what we do anymore with interchangeable names being used, but the sense of 'community' has been established, we have a familiar, knowledgeable and unique network based on years of working together under the Circuit Rider heading... maybe now we just need another name.

About the author

Sarah Lord Soares is an ICT Development Consultant at Lasa and is currently organising the 2011 European Not For Profit Technology Conference.

Tips 160 • Switching to VoIP

In this issue Tim Watkins-Idle tells us in detail how Lasa moved from a traditional phone system to VoIP – here are his tips if you are thinking of going down the VoIP road.:

- 1. Analyse** – think about what you need from a system. Do you want to be able to integrate with your computer address books, for example?
- 2. Consult** – find what your staff want to be able to do. Maybe VoIP on the move for outreach workers or an office number for home-based remote workers...
- 3. Specialist help** – you may be able to source free or low-cost assistance with planning and implementing the system.
- 4. Timing** – you may have to give notice to your current system maintainers if you have them.
- 5. Technical options** – what systems are available and will they suit your needs? Who supplies them and what are the costs? Obtain several quotes and references.
- 6. Budget** – crunch the numbers - can you afford to do this now or is it dependent on funding?
- 7. Call quality** – are you prepared to live with some calls not being as good quality as with traditional phones?
- 8. Hardware** – you'll need new phone handsets, probably a new switch and possibly extra network points and another broadband line.
- 9. Administering** – will you have the skills in-house to manage the system? Will training be required?
- 10. Downtime** – the phone numbers will need to be ported from the old to new system which will take a few hours. When can you live without your phones?

How much will you save over time? Put aside a contingency, there are sure to be additional costs.

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www.ictknowledgebase.org.uk/telephonyneeds

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Information Security in Voluntary Organisations

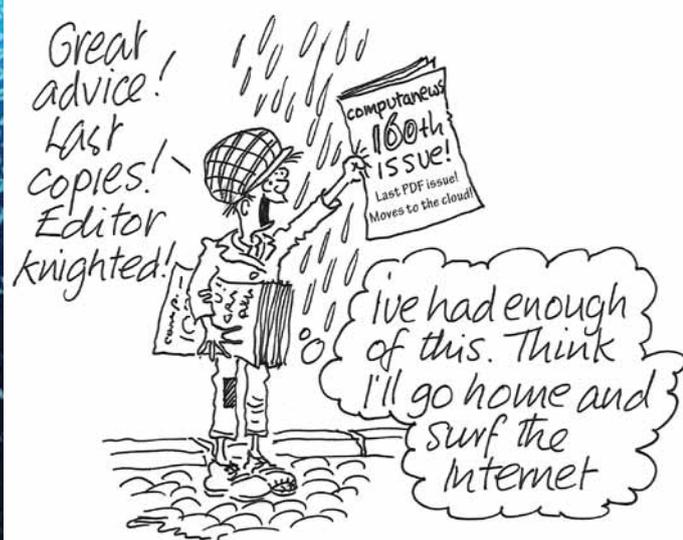
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Paul Ticher's Data Protection update

Reporting breaches

How bad are charities at Data Protection? We don't really know, but the Guardian technology blog has given figures from the Information Commissioner about breaches that have been reported over the past year (6 April 2010 to 22 March 2011).

Of the 2,565 breaches reported, 43 were from charities and a further 25 from clubs and associations. This compared with 401 reported breaches from lenders, and 347 from local government. Our figures may be low, but they demonstrate that incidents do happen.

Guidance on when to report security breaches was issued by the Commissioner in February 2010. See: www.ico.gov.uk/~_/media/documents/library/Data_Protection/Practical_application/BREACH_REPORTING.ashx

The Charity Commission also provides guidance for trustees on reporting serious incidents of all kinds: www.charity-commission.gov.uk/Our_regulatory_activity/Reporting_issues/rsinotes.aspx

Who can you trust?

While the Information Commissioner's use of financial penalties continues to focus on the loss of unencrypted laptops, and fines for failure to Notify are still being levied, your risks may be closer to home.

Data security company Imperva reported at the end of 2010 that 70% of the 1,000 workers they surveyed had "clear plans

to take something with them" on leaving and 72% admitted to taking corporate data in the past – including HR records, customer records and marketing material.

More than half had accessed information they were not entitled to. See: www.out-law.com/page-11566 for more.

Our staff might be more honest than average, but are all of them? At a time when redundancies and cuts are giving people more reasons for disgruntlement maybe it's time to reassess your Acceptable Use Policy and tighten up endpoint protection to prevent data being moved to mobile devices.

Data Processor contracts

You need to watch your collaborating organisations, as well. Hounslow Council was one of the recipients of a penalty – £70,000 – when laptops containing service user data were stolen from an Ealing Council employee. Ealing provided services on behalf of Hounslow, and Hounslow didn't have a written Data Processor contract in place, or monitor Ealing's procedures adequately.

Permission for cookies

Under new European regulations, web sites must, from 25 May this year, give users a genuine choice over whether to accept cookies or not. The revised UK regulations have not been published yet, and will not be strictly enforced immediately. See: www.culture.gov.uk/news/media_releases/8051.aspx

Changes in the law?

The EU is reviewing its Data Protection legislation, and challenging the UK's Data Protection Act on the grounds that it doesn't properly implement the existing EU Directive. Some of the objections are fairly technical, but others relate to the Information Commissioner having insufficient powers of enforcement.

About the author

Paul Ticher is an independent Data Protection specialist and Computanews columnist.

PAUL | TICHER

Data Protection help from the expert

- Our staff need Data Protection training;
- Our Data Protection policies need updating;
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- We've just had a Subject Access Request

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Email: paul@paulticher.com
Call: 0116 273 8191

Open Source Round-up

Paula Graham of Fossbox talks up Ubuntu, berates Unity's corporate toaster runes and rails against the Digital Economy Act.

Spring brings another shiny new Ubuntu release! Natty (11.04) now available to download at www.ubuntu.com.

Natty on the Desktop

Natty's new Unity shell is designed for digital convergence – so it looks and behaves the same whether it's on a tablet, netbook, laptop or desktop PC – touchscreen or keyboard/mouse.

Convergent cloud services (Ubuntu One sync and media services plus a 'deck' for social media) are also integrated into the desktop and the same applications and data can be available across all your devices once the various Ubuntu-powered Atom tablets emerge from the pipeline later this year. This is very good news if you just want the metaphorical toast to pop up without forcing you to care about how computers work. So, you won't have to figure out different systems on your computer there's now a (Mac-like) 'dock' running down the left-hand side which has short-cuts to your applications.

The dock autohides when not in use to give you more screenspace and if it gets overcrowded, the icons 'fold up' at the bottom. Most applications also have a universal menu displayed on a bar at the top so using a variety of applications becomes more intuitive. The more impatient among the techie-minded, on the other hand, may

find Unity annoying, so just choose 'classic' GNOME from the login menu and Unity's evil corporate toaster runes will be replaced with familiar GNOME panels/menus.

Overall, Natty is smooth, fast, pretty and – even though I'm using the beta 2 (test version) at the time of writing – largely trouble-free. Libre Office (www.libreoffice.org/) replaces Open Office, and is now installed by default on Natty. Windows users should also start moving away from Open Office (now moribund) and install Libre Office.

Cloud platform integration on the Natty server

Natty server now offers full integration with the fully open source OpenStack (www.openstack.org/) cloud platform, as well as the rival Eucalyptus (<http://open.eucalyptus.com/>) cloud platform. Natty server's integration of OpenStack addresses corporate fears about lock-in to particular cloud service providers by standardising the platform – so this would also seem the obvious way for the non-profit sector to go.

Codenamed Cactus, the new release of OpenStack supports eight different virtualisation technologies and, going forward, will probably support the RackSpace API with legacy support for Amazon's EC2 (<http://aws.amazon.com/ec2/>).

Other news

The EU Commission is reviewing its data retention rules – campaigners say this doesn't go nearly far enough to protect the public.

Web-blocking and seizure of domains by the police are both still on the agenda but little-publicised. For more information about current digital rights campaigns, visit Open Rights Group (www.openrightsgroup.org/).

The Ada Initiative (<http://adainitiative.org/>) has launched to support women in technology – especially FOSS. It's too late to participate in their recent survey – the first since FLOSSPOLS in 2006 – but I'm looking forward to the results.

About the author

Paula Graham runs Fossbox, a sustainable IT consultancy based in East London, and has been advocating Free Software, sustainable IT, and equal representation for women in ICT for the past decade.

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FOSSBOX

Greener computing in times of austerity?

In hard times and when budgets are tight it's often the services people see as non-essential that are the first to go. Is Greener Computing one of these? Adam Clamp from The Green IT Company investigates.

There is no denying that the initial investment in greener technologies can be far higher than its less green rivals. Even those committed to being greener can find it hard to justify the higher costs of green technologies. However, long term payback can be far higher in many ways, not just in financial terms. But in times of austerity we all look to what we can really afford and with less money available to invest, more people are looking at the cheapest they can find.

But, maybe these austere times are a good thing for us, as we will start to look harder at making the most of and appropriateness of the resources we consume. Instead of instantly replacing older equipment, are there any ways its life can be extended? Holding off on buying new equipment might be a bad

thing for some manufacturers, but not for the planet.

Manufacturers have been pushing products in our direction for many years without any responsibility for their (end of life) take-back or recycling. The WEEE directive has done something to change this, but alas it could be better, and we would like to see more incentivising of manufacturers and consumers to take-back and recycle.

You could also look to the world of cloud or thin client computing. There are so many offerings that claim to be green but are they really? The greenest approach in my opinion is to buy only what you really need and look for scalability in a product. Some web hosting companies like Amazon's EC2 offer cloud services for dedicated servers whereby you pay for only the

amount of time and capacity they actually use. This can be a very cost effective and environmentally sound way of doing business.

And how is the energy that those servers use being generated? For example, Smartbunker (www.smartbunker.com/) state they have a guaranteed renewable energy link with Ecotricity (www.ecotricity.co.uk/). But can you guarantee it in reality? This is why The Green IT Company uses servers in the US-based AISO datacentre (www.aiso.net/). They are 100% solar powered with backup bio-fuel-powered generators. Therefore all our hosting plans for clients are totally powered by the sun.

Maybe when these times of financial hardship come to an end we will have developed ways in which we can harness the great things computing brings whilst helping to minimise its impact upon the planet.

About the author

The Green IT Company was set up to help companies and organisations to implement and use greener forms of technology. It also aims to raise awareness of the environmental impacts of the IT industry and what we can do to reduce them.

www.greenitcompany.co.uk

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101 Tips on How to Buy Fundraising Software and Charity CRM Systems



Ivan Wainwright
itforcharities

101 Tips on How to Buy Fundraising Software and Charity CRM Systems

Ivan Wainwright

Available as a 64 page pdf for £12 from www.itforcharities.co.uk/ or paperback from Amazon.com for \$14.99

Review by Dr Simon Davey

101 Tips on How to Buy Fundraising Software and Charity CRM Systems does exactly what it says on the tin and a little bit more besides. The book is a good and thorough guide to the processes (thinking and more practical) that charities and community groups should go through when they decide to upgrade or buy new fundraising or CRM (Constituent or Client Relationship Management) software. It starts from 'why do you want to do this' and links in to the importance of having organisational processes, systems and strategies in place before you jump into the software.

Ivan Wainwright is a very experienced consultant in the charity sector with a particular

focus on databases. He has seen the process from both the software company end and the client side so is well placed to comment on what to do right and more importantly how to avoid doing anything wrong. Ivan also maintains the ITForCharities website www.itforcharities.co.uk

The book is broken into sections and the tips are well laid out. It starts with Strategy (or rather planning, asking why you want to do this and who's going to help make it happen), moves onto Costs, Hardware and IT infrastructure (what do you need to make the software work). This is followed by Data Migration, Integration (how does it fit with other systems and processes), Creating an ITT Document (Invitation To Tender, what to give your potential suppliers), References (making sure you get a good supplier), Software and Licences, Managing Software Demos, and The Supplier. After Final Important Thoughts (well, two) it concludes with a useful appendix of resources which offer the reader somewhere to go for further advice and assistance - which could possibly be straight to a consultant to help guide them through the process after all that!

The title rather undersells the content - this is much more than how to buy. It tells you what you should be doing to plan and sort out your systems as well as how to make it work once you've bought it. Ivan clearly understands that a database is for a good few years, not just a quick purchase from a bit of underspend, a valuable tip in itself. The content would apply to most IT procurement.

The book apparently originated from Ivan publishing tips on Twitter. From 140 characters to 63 pages

is a big jump but a lot of thought has gone into this. One concern is that there are quick little tips mixed in with fairly long sections which, whilst well written and carefully considered, may scare some readers into taking shortcuts or not attempting them at all. Some tips (e.g. training) appear rather sketched over but that could be because of the compromise between volume of content and keeping it to a manageable read. I'm pleased to note that Ivan does address the problem of backfilling staff time (how to keep your organisation running amidst the project demands) and decommissioning your old database.

Perhaps the best compliment I can pay this book is that I wish I had written it first! Ultimately the book is a useful resource and an easy and leisurely read in about an hour. It could be more practical if it gave some perspective of how much time and effort was likely to be required in some of the recommended activities and I would have liked an index of all 101 tips, possibly as a checklist. Having said that, it is a 'tips' book and not a toolkit. The structure and volume of detail is necessary for the subject but could be daunting to some and that's a shame as it is a valuable resource. If you, or your organisation, want to buy fundraising software or CRM this is a very good place to start.

About the Author

Simon Davey is a veteran of the non-profit technology sector and is the Managing Director of IT consultancy, Preponderate Network.

www.preponderate.co.uk/

Archiving emails

A question was asked recently on the UKRiders mailing list: *“What do organisations do about archiving emails in practice? As I understand the legal position, emails are written documents and so can commit an organisation to a contract, libel people and so on. For this reason they should be kept for six years, the limit of civil liability, in case of legal action. Are organisations ever really taken to court on the basis of five-year-old emails?”*

What’s the issue?

It is a serious issue, although generally not taken seriously by smaller organisations. The fact is that it is highly unlikely one in a million emails will be needed, but essential that anything contractual or human resource-related is saved as that is what is possibly a liability. So do you selectively save from the people who might have emails of this nature, or (horrible solution) make sure they get printed or what? Do organisations who have in house email management keep six years worth of backups? Technically - and legally - you should but...

What tools or procedures are available to help?

There are a number of ways of dealing with archiving ranging from practical methods and policies using existing systems to specialist software and services. Some peripheral emails are troublesome to archive, specifically emails sent by a member of staff to and from personal accounts and mobile devices that keep separate folders. It’s not always possible to catch them all. Perhaps a public folder or something of that nature could be set up to catch the important mail – however, this depends on staff actually doing this which may not be a priority for them.

A possible method for small organisations or individuals is when closing a project to copy all the related e-mails - without trying to sort out which are worth keeping - into a normal folder within the project folder, along with all the other documents, and archive the lot to (a) an archive on a spare hard drive and sometimes (b) a CD or DVD as well. One thing to remember is to be sure to include sent e-mails as well as received ones. Copying and dragging the e-mails straight into a folder is quick and easy, and they can easily be restored as required.

The least troublesome methods require no intervention from users. For example, Lasa uses Microsoft Exchange with a commercial archiving product on top called GFI MailArchiver (www.gfi.com/mailarchiver), which takes copies of all e-mails (internal, external, inbound, outbound) and archives them away from Exchange Server in a SQL database. You can specify certain sorts of e-mails which are not saved (e.g. backup confirmation e-mails, spam, list mail and WAV format e-mails from our voicemail software). It’s searchable from within Outlook, but runs a bit slower than looking through an inbox.

That way everything is saved, but it doesn’t clog up Exchange or rely

on Outlook’s archiving (which by default archives to the local disc which is not a good idea) and means you can clear out mailboxes of ex-staff members after a suitable period in the knowledge that it’s all still in the archive. The mail in the archive SQL files are arranged by year so can be deleted after six years if necessary and are backed up online and onto our internal NAS drive.

However, even with GFI MailArchiver on Exchange, you may not be able to capture all emails. For instance, if a user uses a smartphone that maintains its own “sent items” folder, that may not be captured by Exchange hence it won’t be archived. This is the Achilles heel of efforts to archive emails for compliance with the 6 years rule. Essentially, this then comes down to organisational policy – if you are emailing something that has legal, financial or contractual content then make sure you do it from within the email system.

Other alternatives to GFI include Mail Store (available for 30 day trial and at charity rates from Zen Software (www.zensoftware.co.uk/) who also run a weekly webinar on Mail Store) and Symantec’s Enterprise Vault (www.symantec.com/business/enterprise-vault).

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Cloud based options

The cloud is also bringing alternatives to traditional internal systems. For example, a zero hardware solution, fully hosted in the cloud is Google Apps which has 10 year message archiving through Postini (www.google.com/apps/intl/en/business/security_pricing.html). It takes all the maintenance / hardware / location issues off your hands, and is a straightforward annual fee of \$83 USD per user per year for Google Apps Premier and Postini 10 year retention.

The obligatory data protection warnings

Don't forget that you may have to provide copies of emails you hold in response to a Data Protection Act subject access request. A related but potentially huge issue then is - do you keep a record of where you got every email sign up for your e-newsletters? You may well be asked "why are you



emailing me, where did you get my email from?" and under the DPA you should be able to prove that they opted in, whether that is from a form going into your email system like CharityeMail or CTTM@iler, and the system capturing the data, or them emailing you and you keeping it.

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About Lasa

Established in 1984, Lasa has provided technology advice to the third sector for 25 years. Its two main aims are to promote social inclusion through access to social welfare law, information, advice and guidance; and to promote an efficient and effective sector through improving access to impartial technology advice and support resources – such as Computanews and the London e-bulletin (www.lasa.org.uk/lasa/mailling-lists)

Our online ICT Knowledgebase (www.ictknowledgebase.org.uk) is a comprehensive source of independent expert technology advice for third sector organisations, now containing over 300 articles. The Suppliers Directory (www.suppliersdirectory.org.uk) connects third sector organisations with over 150 approved suppliers of technology products and support services across England. Lasa is also noted for its consultancy work and leadership in developing the Circuit Rider model of local technology support. (<http://ukriders.lasa.org.uk/>)

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