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NHSmail Managed Migrations Implementation Guide

Contents

1	Introduction	5
1.1	Intended Audience	5
2	Example Migration Timeline	6
3	Readiness (Stage 1)	7
3.1	Stage Overview	7
3.1.1	Stage Breakdown	7
3.1.2	Organisation Resource Considerations	8
3.2	Readiness Workshop	8
3.3	Readiness Weekly Calls	9
3.4	Pre-Requisites	9
3.4.1	Accenture Pre-reqs Check	9
3.5	Agreeing Implementation Dates	10
3.5.1	Migration Schedule	10
3.6	Key Workstreams	11
3.7	Licensing & Platform Change	11
4	Implementation (Stage 2)	12
4.1	Stage Overview	12
4.1.1	Stage Breakdown	12
4.1.2	Organisation Resource Considerations	12
4.2	Core Tooling	13
4.2.1	QMM	13
4.2.2	TANSync/CSV Upload	13
4.3	Beta Testing	13
4.3.1	Beta Testing Confirmation	13
4.4	Provisioning New Accounts	13
4.4.1	Forwarders	14
5	Pilot (Stage 3)	15
5.1	Stage Overview	15
5.1.1	Stage Breakdown	15
5.1.2	Organisation Resource Considerations	15
5.2	Selecting Pilot Users	16

5.3	Running the Pilot	16
5.3.1	Migration Schedule	16
5.4	Pilot Users Check	17
5.5	Go No Go Call	17
<hr/>		
6	Sync & Switch (Stage 4)	18
<hr/>		
6.1	Stage Overview	18
6.1.1	Stage Breakdown	18
6.1.2	Organisation Resource Considerations	18
6.2	Overview of Live Migration Process	19
6.2.1	Outlook Profiles	19
6.3	Migration Monitoring	19
6.3.1	Issue Resolution – Data Cleansing	20
6.4	VIP Users	20
<hr/>		
7	Mop-up (Stage 5)	21
<hr/>		
7.1	Stage Overview	21
7.1.1	Stage Breakdown	21
7.1.2	Organisation Resource Considerations	21
7.2	Alternative Mop-up Options	22
7.3	MX Switch	22
<hr/>		
8	Close (Stage 6)	23
<hr/>		
8.1	Stage Overview	23
8.1.1	Stage Breakdown	23
8.1.2	Organisation Resource Recommendations	23
8.2	Service Readiness	23
8.3	Tooling Uninstall	24
8.4	Lessons Learned	24
<hr/>		
9	Responsibility Matrix	25
<hr/>		
10	Communications	27
<hr/>		
10.1	Communications Methods	27
10.2	Communications Content Tips	27
<hr/>		
11	Training	29
<hr/>		
11.1	Organisation Specific Training	29
<hr/>		
12	Service Desk	30

12.1	Reducing Call Volumes	30
13 Information Governance/Clinical Safety		31
13.1	Organisation specific branding	31
14 Project Governance		32
14.1	Accenture Escalations	32
15 Lessons Learned		33

1 Introduction

NHSmial is a national secure collaboration service for health and social care designed to enable the secure exchange of information by email and other methods. The core platform consists of Microsoft Exchange 2013, an administrative portal and Skype for Business Instant Messaging and Presence. In addition to the NHSmial core offering, a number of add-on services are available for purchase including Skype for Business Audio and Video Conferencing and larger mailbox sizes.

This guide is designed for organisations planning to undergo a managed migration to NHSmial. It provides an overview of the migration process and key deployment activities aimed to describe, at project level, what to expect throughout the implementation. This document is not intended to describe the technical solution.

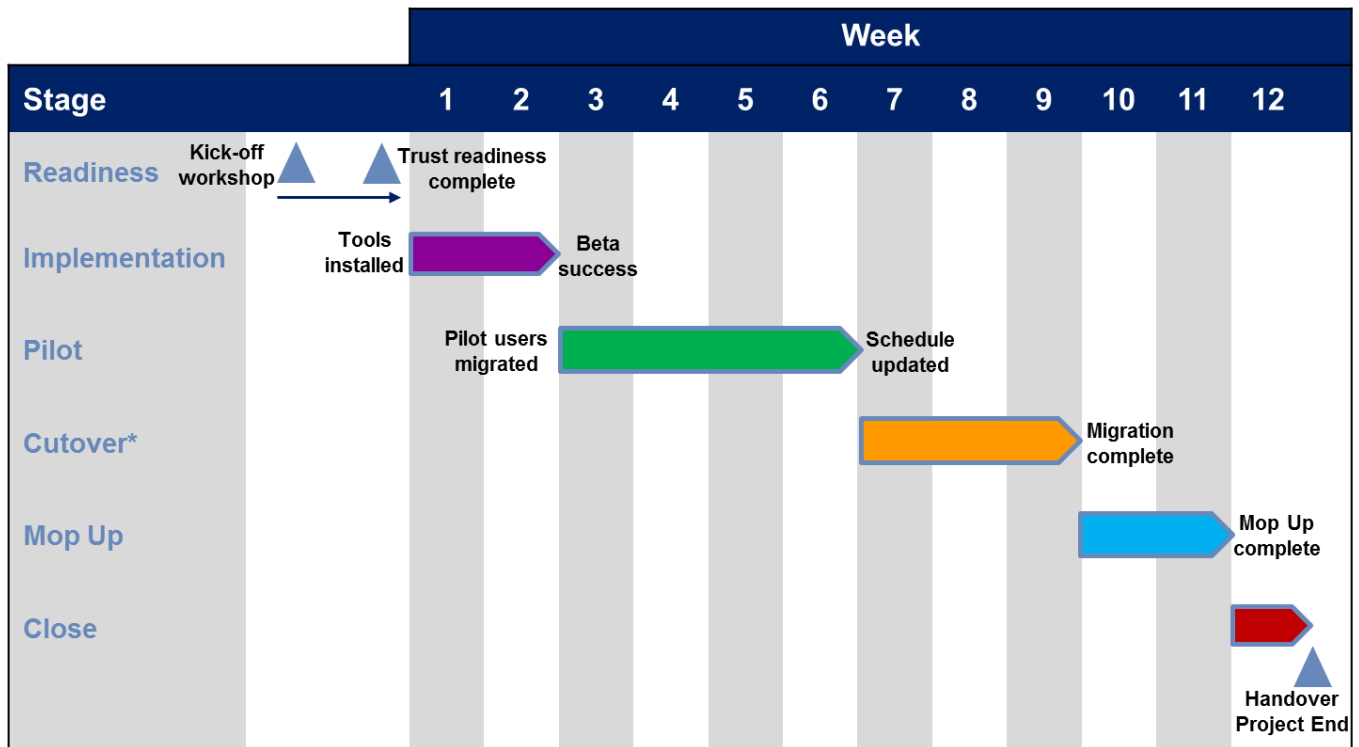
The guide provides an overview of the standard migration timeline, a detailed explanation of process and key considerations for each stage and then useful information for the key workstreams of a migration project.

1.1 Intended Audience

The intended audience for this document is the NHS project manager responsible for the NHSmial migration along with all senior stakeholders wishing to understand the high level deployment activities involved in an NHSmial migration.

2 Example Migration Timeline

The following timeline shows the high level plan for an example migration project. The timescales for the sync/cutover will vary depending on whether the Organisation go with the recommended ‘at pace’ approach or split the migration into 5000 users per week, this will be defined through readiness. On average, Organisations will be able to complete the pre-req activities of the readiness stage in 2-4 weeks.



Stage 1 – Readiness (pre-deployment) Completion of multiple pre-req tasks by the Organisation in order to ensure data, environments and infrastructure is prepared and suitable to complete an NHSmail migration. Requires 2 weeks of Accenture checking once complete to ensure all submitted pre-reqs are validated.

Stage 2 – Implementation (deployment weeks 1-2) Accenture complete the installation of all the required tooling to complete the migration followed by beta testing of this tooling to ensure that the setup works as expected.

Stage 3 – Pilot (deployment weeks 3-6) Organisation and Accenture complete Pilot testing of around 5%-10% of in scope users depending on the complexity of the migration. Once pilot is complete hold a Go/No-Go call with NHS Digital to agree to move into live sync and switch.

Stage 4 Sync & Switch (deployment weeks 7-9) Accenture complete the live sync and switch (migration) of all in scope users according to the migration schedule. This schedule will be agreed by both parties throughout the readiness stage and finalised throughout the pilot.

Stage 5 Mop-Up (deployment weeks 10-11) Accenture and the Organisation review all migration issues to ensure they have been captured and resolved as part of sync and switch then finalise any of the more complex issues that were previously parked.

Stage 6 Close (deployment week 12) The Organisation complete sign off on the project and Accenture capture lessons learned for the project.

Sections 3 to 8 of this guide discuss each stage in further detail.

3 Readiness (Stage 1)

Requirements to Enter Stage: Top-up services agreement, Discovery questionnaire
Maximum Length: Time required by Organisation + 2 weeks Accenture validation
Main Objectives: Complete pre-reqs required to enter deployment
Exit Criteria: Full set of pre-reqs signed off by Accenture, Licenses purchased, RFC agreed

3.1 Stage Overview

The readiness stage starts once a Organisation has signed a Top-up services agreement and returned their completed discovery questionnaire. Prior to these two items being completed, a Organisation remains in the sign-up stage and as such Accenture deployment activity cannot be started.

Once the above items are returned, these will be processed by the Accenture NHSmail Central team who will get in contact to agree a suitable date for the readiness workshop and subsequent weekly calls to track progress. You will also be provided with the latest documentation for the readiness stage, this should replace anything that you may have been provided with throughout the sign-up stage (e.g. pre-reqs are constantly evolving through lessons learned so we will want to ensure you have the most up to date version prior to beginning the work).

On average, the readiness activities should take the Organisation 2-4 weeks to complete followed by 2 weeks for Accenture to check the pre-requisites and provide any corrections that are required prior to entering the implementation stage. Accenture will discuss the Organisation timescales at the initial readiness workshop to understand the Organisation resource levels and agree how long the pre-req tasks will take to complete. Once the pre-reqs checklist is fully signed off by the Accenture technical team, the Organisation are considered ready to enter implementation.

3.1.1 Stage Breakdown

The table below provides a high level overview of the week by week tasks for this stage along with the deadlines for key deliverables. This table assumes that it will take the Organisation 4 weeks to complete all the pre-requisite tasks.

Stage Week	Organisation Activities	Accenture Activities	Key Deliverables
1	Attend Readiness Workshop Begin Pre-reqs Confirm full project team	Run Readiness Workshop Agree slot plan date	Forecasted Pre-reqs checklist aligning to slot plan date (TR)
2	Progress with Pre-reqs Attend weekly progress call	Hold weekly progress call Respond to Organisation queries	
3	Progress with Pre-reqs Attend weekly progress call Submit order form and purchase order	Hold weekly progress call Respond to Organisation queries	Order form (TR) Purchase Order (TR)
4	Submit all Pre-reqs Attend weekly progress call	Hold weekly progress call	Full set of completed pre-reqs (TR)

	Develop Communications & Training Plan	Respond to Organisation queries Raise RFC, uplift request & license order	Communications & Training Plan (TR)
5	Fix pre-req issues raised by Accenture Attend weekly progress call	Hold weekly progress call Review Pre-reqs	Licences (AC) Approved RFC (AC) Migration Schedule (AC)
6	Fix pre-req issues raised by Accenture Attend weekly progress call	Hold weekly progress call Review Pre-reqs Sign-off Pre-reqs	Confirmation of readiness for implementation (AC)

3.1.2 Organisation Resource Considerations

The specific Organisation resources recommended to be involved in the readiness stage have been detailed below. This ensures that there is the appropriate expertise in order to complete the pre-reqs and involves the appropriate leads to engage the key workstreams that will be discussed through this stage. The actual levels of each resource required will vary depending on the Organisation size:

- Project Manager
- Technical – Data Collector
- Technical – AD
- Technical – Server
- Communications/Training Lead
- IG/Clinical Safety Lead
- Records Management Lead
- Helpdesk Lead
- Senior Stakeholders

3.2 Readiness Workshop

The readiness workshop is designed to provide an overview of the technical migration solution followed by a run through of the pre-reqs checklist assigning forecast dates along with owners to each of the tasks. It is a chance to meet key people from the Accenture team as well as the Accenture team meeting key people from the Organisation.

The workshop agenda will require approximately 3 hours and will be completed onsite at the Organisation location. Organisation Attendees should include project manager, senior project and technical stakeholders, project leads and project technical analysts.

The day will be aligned to the following agenda:

- Introductions
- High Level Process
- Managed Migration Timeline
- Technical Overview
- Migration pre-requisites
- Initial Planning – Agreeing estimates for pre-reqs
- Workshop Close & Questions

All parties should come away from the workshop with a clear understanding of what work needs to be done in order to complete the readiness stage and the dates for completion. This will be recorded into the pre-reqs checklist by adding owners and forecasts into this document.

3.3 Readiness Weekly Calls

As the readiness workshop is planned, you will also be asked for a suitable time to have a weekly progress call. These calls are expected to last up to an hour.

The calls will be project focused in order to track progress against the pre-req checklist. They should be attended by the NHS project manager along with the Accenture NHSmail Central Team and/or project manager. They will be used to run through the pre-reqs checklist reviewing forecast dates and completion status. After each call, the NHSmail Central Team will send out the updated pre-reqs checklist.

Lessons show that these calls should be project status focused rather than technical focused. If the core group on the call agrees there are issues that require a technical conversation, then Accenture will facilitate this call to allow the Organisation technical team to discuss with a member of the Accenture technical migration team. This will be completed as a separate call outside of the weekly updates.

In addition to the above, it is important that issues are not saved up for these calls which can often be the case when tracking on a weekly basis. All queries requiring advice and clarification from Accenture throughout the readiness stage should be sent to NHSmail.Central@accenture.com. A member of the NHSmail central team will then respond prior to having to wait for a weekly call. This allows for a prompter response as well as ensuring the weekly calls can be utilised fully for their status tracking purpose.

3.4 Pre-Requisites

The main objective of the readiness stage is to complete all the pre-requisite tasks required to enter deployment. If these tasks are not completed, then deployment cannot begin until all missing tasks are finalised. The pre-reqs will shape the rest of the project so it is vital that these are completed on time and accurately to ensure a successful migration project.

There are a combination of technical and project tasks required, including, but not limited to:

- Data gathering of existing mailbox information
- Sever provisioning
- AD data cleansing
- Remote access setup
- Schedule estimating
- Helpdesk planning
- Communications planning

It is essential that the Organisation are suitably resourced for the completing the pre reqs. The resource profile at the start of this section should be used to ensure that your project team is suitably resourced prior to beginning the readiness stage. This resource should be carefully considered prior to the readiness workshop to ensure that the correct people are present for the technical run through and also to ensure the initial pre-reqs checklist can be completed with realistic timeframes and owners at the readiness workshop.

3.4.1 Accenture Pre-reqs Check

The final 2 weeks of the readiness stage require Accenture to do a thorough check on the pre-reqs that you have submitted. This will involve checking data formats, testing remote access, validating migration plans etc. It is important that the Organisation technical team remains responsive throughout these 2 weeks so that any issues can be dealt with promptly and returned to Accenture for further checking. Once complete, Accenture will confirm that the pre-reqs have been signed off and that the implementation stage can progress in line with the agreed plan discussed in section 2.5.

3.5 Agreeing Implementation Dates

It is likely that by this point you will have had initial discussions around migration dates and any dependencies you may have. However, in order to 'lock' your live migration dates into the Accenture slot plan, we require the commitment from the Organisation to ensure that dates can be met. Accenture are happy to agree these dates at any time between the Organisation entering the Readiness stage up until the Readiness workshop at which point Organisation resource commitments will need to be finalised and dates agreed.

The dates will depend on whether the Organisation can meet the standard timeline for readiness, as due to the constant and sequential nature of a deployment, this will dictate when the implementation stage, along with all subsequent stages can start.

Due to the number of Organisations migrating in parallel it is essential that the Organisation is able to achieve their agreed timeline as Accenture will assign all future stage resources at the point of agreement. Any Organisation delays (even as small as a few days) could require the Organisation to move their live migration dates to the back of the slot plan and the implementation stage onwards to be re-planned. Therefore any risks to the agreed dates should be shared with Accenture immediately so that these can be discussed.

Accenture will obviously work with the Organisation to help mitigate this risk and will highlight any major concerns throughout the weekly calls.

3.5.1 Migration Schedule

A key item that will feed into your overall implementation dates is your live migration schedule. This is the scheduling of all your users and when each will migrate. Accenture recommend an 'at pace' approach where once your pilot is completed, your remaining users will all migrate on the same defined date. This ensures that you minimise the impact of users being split across different platforms which can cause issues with shared resources and permissions. It is expected that this will fall in line with how you would usually complete large scale deployments within your Organisation

If you are a larger organisation and wish to split your live migration into weekly groups of users, Accenture can support this 5000 users at a time. To aid this you will be required to complete the 'Grouping' spreadsheet as part of the pre-reqs. Accenture use this to create your initial schedule which will run at a rate of 5000 users per week. This will be reviewed at the pilot stage, and if infrastructure allows, there will be the option to increase this run rate.

The run rate cannot be decreased so it is important that support levels can manage the migration schedule.

3.5.2 Implementation Plan

Documentation of the agreed project dates as well as outlining scope, deliverables, payment milestones and the service sign off criteria, will be provided through an implementation plan shared towards the end of the readiness stage. This will be provided to the organisation as the pre-reqs are submitted to allow 2 weeks for sign off. The implementation phase cannot begin without this document being signed off by the organisation SRO.

To ensure the you have sight of this document as soon as possible and can reference it when creating any organisation project documentation (e.g. PID), a draft version of the Implementation Plan will be provided at the start of the readiness phase containing the initial dates agreed at the readiness workshop. This version will not require a signature from the organisation.

The implementation plan will also contain the service readiness sign off. This includes the key deliverables and dates that both parties have committed to throughout the implementation plan. Any changes to these dates will need to follow Accenture's change control process and following agreement the dates within the service readiness form will be updated and a new version issued. The baseline dates in the implementation plan itself will remain.

3.6 Key Workstreams

It is essential from the readiness stage that the Organisation are considering the additional key workstreams that will run throughout the duration of the project and resourcing appropriately to cover the work required from these workstreams. In particular the following should be considered:

- **Communications** – Communications to end-users will be an on-going requirement throughout the project. Your communications lead will be required to design and send regular emails to keep end-users updated and give them key instructions to ensure a smooth migration. More information can be found in **section 10** of this document.
- **Service Desk** – Throughout the migration and for a number of weeks beyond, there will be a significant increase in the calls received to your helpdesk. There are a number of actions you can take to help reduce these, however, you will not eliminate all additional calls and the helpdesk will need to be appropriately resourced throughout the migration to cope with these. More information can be found in **section 12** of this document.
- **Information Governance/Clinical Safety** – There are two key considerations for information governance throughout this migration; agreeing the Accenture remote access and agreeing if there are any process/user training updates required to align the Organisation IG to the NHSmial platform. More information can be found in **section 13** of this document.

3.7 Licensing & Platform Change

In order to prepare for the implementation stage, Accenture will need to order the required number of licenses for the migration as well as requesting the change to the NHSmial platform for the migration to take place. Both of these activities require Accenture to have your order form and purchase order signed off and returned. This should be done as early as possible in the readiness stage with a final deadline of 4 weeks before the implementation stage begins. This is due to the lead times on the above activities. Any delay in meeting this deadline will mean that your allocated migrated slot will need to be released and a new one assigned once new deadlines have been agreed. As outlined in section 2.6 above, this is likely to be a substantial delay due to other projects having fixed dates in the slot plan.

4 Implementation (Stage 2)

Requirements to Enter Stage: Full set of pre-reqs signed off by Accenture, Licenses purchased, RFC agreed

Standard Length: 2 weeks

Main Objectives: Install tooling, Complete beta testing, Provision new accounts, Create distribution lists, shared mailboxes and inject delegate permissions

Exit Criteria: Beta testing complete confirmation

4.1 Stage Overview

The implementation stage will begin immediately once the readiness stage has been completed and signifies the start of the deployment.

One of the Accenture technical team will be onsite to complete the initial implementation stage tasks. This is to complete the tooling installation and configuration as well as ensuring everything is in place in order to continue remotely. Remote working is a requirement to allow the Accenture technical resource to be more responsive to all sites and not constrained by travel. If there are any issues throughout the initial onsite days, these will be escalated through the Accenture technical team lead and a decision made whether there is a requirement for further onsite presence from the Accenture technical team.

Once the tooling is installed, beta testing will take place to assure the installation and following the success of this testing the implementation stage will be considered complete. The stage takes a total of 2 weeks to complete the installation and testing.

4.1.1 Stage Breakdown

The table below provides a high level overview of the week by week tasks for this stage along with the deadlines for key deliverables.

Stage Week	Organisation Activities	Accenture Activities	Key Deliverables
1	Support tooling installation Agree new accounts and forwarders Send comms to Pilot users	Complete installation of tools Create new accounts and forwarders (excluding existing accounts)	
2	Support beta testing	Run beta testing Beta testing mop-up	Beta testing successful confirmation

4.1.2 Organisation Resource Considerations

The specific Organisation resources recommended to be involved in the implementation stage have been detailed below. Although Accenture will be responsible for the installation and testing throughout the implementation, the Organisation should have adequate technical resource to respond to any issues that require Organisation input to resolve. The actual levels of each resource required will vary depending on the Organisation size.

- Project Manager
- Technical Resource – Issue resolution
- Communications Lead

- IG Lead
- Helpdesk Lead

4.2 Core Tooling

There are a number of core tools that Accenture will install throughout the implementation stage. These are required in order for Accenture to provide their migration solution.

4.2.1 QMM

Quest Migration Manager (QMM) is the tooling used by Accenture to perform the migration. It provides 0 Impact User Experience throughout the migration process minimizing the risk and business disruption for the entire organization. As part of the pre-reqs tasks the Organisation will have provisioned the relevant infrastructure for QMM based on specs provided by Accenture. The server specifications required for QMM will depend on the number of mailboxes to be migrated and Accenture will advise on these at the readiness workshop.

4.2.2 TANSync/CSV Upload

TANSync is an Identity Manager Solution which enables organisations to synchronise local people data with the NHSmail 2 API. TANSync is available for organizations wishing to synchronize user account information into the NHSmail 2 platform. TANSync pushes information from the local Active Directory or SQL, into the NHS Portal. The Portal then syncs the information into the NHSmail Exchange and Active Directory servers. This will also serve as the account creation process for provisioning new accounts.

Alternatively, data can be synchronised through the creating and uploading of CSV files. Accenture will work with you throughout the deployment to ensure that the most suitable solution is used.

4.3 Beta Testing

The beta testing will begin once all the required tooling has been installed and considered to be working. This is expected to start no later than week 2 of the implementation stage. There will be no live users for this testing and will all be done on the 'Dummy' accounts that you have provided as part of the readiness stage.

4.3.1 Beta Testing Confirmation

There is written feedback provided for the beta testing (as there is with the Pilot) due to it being done on 'Dummy' data and designed to be more of a problem solving task on the installation. However, in order to help track progress, an email will be distributed on successful completion of the testing to highlight that the task has been completed and successful. This allows the project to continue into the pilot stage.

4.4 Provisioning New Accounts

In order to start the pilot, all new NHSmail accounts need to be provisioned within the implementation stage. Once this has been completed the Organisation leavers and joiners process defined as part of the pre-reqs checklist will need to be followed for all new joiners and leavers.

Once accounts are provisioned the user has 90 days to log in and complete their security questions and change their password. If this is not completed within the required timeframe, the account will be locked and won't be useable until unlocked via a local helpdesk call. With this in mind it is important that all users complete this action as early as possible. Accenture will provide the account details in

an excel format that will allow for mail merging should the Organisation want to send out account detail comms in bulk.

It is advised that the Organisation monitor this activity and staff uptake closely to ensure that issues are reduced throughout sync & switch.

4.4.1 Forwarders

Forwarders will be switched on at this point to forward all emails sent to the users nhs.net address onto their on-prem account. This is done as nhs.net email addresses are now live and within the directory and have the potential to receive email. Since the new user won't be monitoring this account until they are live it is required to put these forwarders in place until the user is switched over in the live migration. Accenture will create these for all new accounts, however, they will not be added to users with existing NHSmal accounts due to the risk of redirecting sensitive data to the on-prem mailbox. The appropriate comms will need to be sent to existing users to inform them that as more users within their organisation are switched over to NHSmal, the throughput into their current NHSmal account will likely increase and should be closely monitored alongside their on-prem account until they are switched. It is essential that current users follow these instructions even if they are used to only checking their NHSmal account on a very infrequent basis.

If a Trust also wishes to have forwarders applied to existing NHSmal accounts, this can be done but will not be completed as standard. In order to apply these, Accenture will require an email from the Organisation Caldicott guardian to briefly explain the decision to apply forwarders to existing users and confirming that they are happy to sign this off from an IG perspective and proceed. This sign off is required as applying these forwarders will mean that all NHSmal accounts currently in use, potentially for sensitive data, will have all their emails automatically forwarded to the associated local email solution until the mailbox is migrated. The duration of these forwarders being active is likely to be 4-6 weeks depending on your live migration schedule.

5 Pilot (Stage 3)

Requirements to Enter Stage: Complete installation and testing of all required tooling throughout the implementation stage

Standard Length: 4 weeks

Main Objectives: Test migration with real users, agree readiness for live migration

Exit Criteria: Final implementation schedule, Go no go call

5.1 Stage Overview

The pilot stage tests the migration with small subset of user accounts. The stage lasts 3 weeks, with at least one of those weeks being utilised by the user themselves to test the migration and highlight any issues. All issues are then investigated and either fixed or explained in order to provide confidence to progress into the live sync.

The number of users required to take part in the pilot will vary depending on the complexity of the migration. It will likely vary between 5%-10% of your total migration scope. This is discussed in the readiness stage where the pilot users are decided.

In order to proceed from this stage, the Organisation, Accenture and NHS Digital are required to have a go/no-go call to review readiness and agree that we should progress into the live sync & switch.

5.1.1 Stage Breakdown

The table below provides a high level overview of the week by week tasks for this stage along with the deadlines for key deliverables.

Stage Week	Organisation Activities	Accenture Activities	Key Deliverables
1	Complete testing on user accounts Support issue resolution	Complete the migration of pilot users Investigate and fix raised issues	
2	Review testing on user accounts Support issue resolution	Investigate and fix raised issues	
3	Complete testing on user accounts Support issue resolution	Complete the migration of additional pilot users Investigate and fix raised issues	Final migration schedule
4	Attend go no go call Send final user comms	Host go no go call	Go no go confirmation

5.1.2 Organisation Resource Considerations

The specific Organisation resources recommended to be involved in the implementation stage have been detailed below. Accenture will complete the pilot migration and help investigate and resolve issues throughout the user testing, however, the Organisation will also be required to have technical

resource available to assist with investigating pilot issues. The actual levels of each resource required will vary depending on the Organisation size.

- Project Manager
- Technical Resource – Issue resolution
- Communications Lead
- Helpdesk Lead
- Individual Pilot Users

5.2 Selecting Pilot Users

As part of the readiness stage you will be required to provide Accenture with the list of users you wish to use for the pilot. The following points should be considered when choosing the users for your pilot.

- Users will need to be available throughout the duration of the pilot
- Users that have complex mailboxes will enable full testing – special permissions, shared mailboxes, shared calendars etc.
- Users should cover a variety of departments
- Users should cover a variety of different desktop profiles to ensure issues are found across all your setups
- Senior management should not be included in the pilot

Taking all the above into consideration will ensure that you cover a good cross section of your Organisation and make the pilot as valuable as possible.

Where there is also a reliance on shared mailboxes for the selected users, these will also need to be brought into scope and migrated as part of the pilot. If a shared mailbox is brought into scope for the pilot, you will need to ensure that all members of that shared mailbox are also in scope for the pilot so that they don't lose access to the new email to the shared mailbox once switched.

5.3 Running the Pilot

Accenture technical resource will be onsite for the first day of the pilot to ensure the smooth migration of all users, shared mailboxes and distribution lists that have been marked as in scope for the pilot. The processes used to migrate these users will be the same as those that will be used for the live sync and switch in order to validate the migration processes on the Organisation's infrastructure. Any issues will be reviewed and resolved by Accenture, although as mentioned previously the Organisation should have technical resource available to help assist with any resolutions.

The pilot will run in 2 different phases. The initial phase in week 1 will run against a small subset of the identified pilot users. This pilot migration will then be validated with issues being investigated and fixed throughout week 2. The remainder, larger set of pilot users, will then be migrated in week 3 with further checks taking place to ensure that the migration is proven for a larger number of users prior to commencing the live migration.

5.3.1 Migration Schedule

Once the pilot migration has run, Accenture will finalise the migration schedule and distribute. This is the final plan that will be used for the live migration. Any changes to this schedule after this point will require a firebreak in the live migration to review and amend the remainder of the schedule (if running the split approach rather than the 'at pace' approach). This will need to be followed by a change request to agree and plan the updated schedule.

5.4 Pilot Users Check

Once the migration has been completed for the pilot, the users involved will be required to validate the migration through the use of their mailbox. It is recommended that these users are given a week to both complete their checks and also use their mailbox in an 'everyday' way to help highlight any issues that might occur. Users should be informed to use their mailboxes as normal in this pilot period, but also pay particular focus to the following items to ensure that they have migrated correctly:

- A variety of historic mail items
- Past and future calendar items
- Folder structures
- Any special permissions that the user has on their mailbox
- Shared mailbox access

Any migration issues found throughout this checking that requires Accenture input to investigate should be raised immediately to your project manager and not stored until the end of the pilot period. This will prevent delays towards the end of the pilot.

Once all checks are complete Accenture and the Organisation will have a call to review issues and agree any required actions prior to the go no go call.

5.5 Go No Go Call

In order to progress into the sync and switch live migration stage, a go no go call must take place between Accenture, the Organisation and NHS Digital. This call will be used for NHS Digital to confirm a successful pilot along with the Organisation's readiness in other key workstreams. An example agenda for this call includes:

- Overview of the pilot
- End user communications – sent and planned
- Helpdesk readiness – resourcing and guides
- Technical readiness
- Live migration resourcing

Accenture will run through the agenda items with NHS Digital and the Organisation will support with input where required. An email will follow the call to confirm the decision.

6 Sync & Switch (Stage 4)

Requirements to Enter Stage: Authority to proceed from go no go call

Standard Length: Dependant on number of users and agreed approach

Main Objectives: Perform the live migration

Exit Criteria: All users in scope have been through the live migration process

6.1 Stage Overview

Sync and switch is the live migration stage. This is where all users who are within the scope of the project will have their mailboxes migrated. The migration is monitored on a constant basis and any users that were unable to migrate or failed the validation rules will be reported and then an action taken to either fix or place into the mop-up stage.

The length of the sync & switch stage is defined by the migration schedule that is created as part of readiness and then reviewed as part of the pilot.

6.1.1 Stage Breakdown

The table below provides a high level overview of the week by week tasks for this stage along with the deadlines for key deliverables.

Stage Week	Organisation Activities	Accenture Activities	Key Deliverables
ALL	Provide ongoing comms Support issue resolution Provide user helpdesk support Monitor migration schedule	Perform live migration Report on issues Support issue resolution	Monitoring reports

6.1.2 Organisation Resource Considerations

The specific Organisation resources recommended to be involved in the implementation stage have been detailed below. Accenture will manage the overall live migration and monitoring, however, there it is expected that there will be a heavy requirement for Organisation technical resource to help identify and resolve any issues as they are reported. There will also be a requirement to provide ongoing comms to keep all users informed of ongoing progress. It maybe that resource levels can be reduced as the sync and switch stage progresses. The actual levels of each resource required will vary depending on the Organisation size.

- Project Manager
- Technical Resource – Issue resolution
- Communications Lead
- Helpdesk Team

6.2 Overview of Live Migration Process

Once into the live migration stage, it is very much an automated process with ongoing monitoring to ensure issues are captured. Each mailbox will migrate using the following process:

- **Create collections** – Create all collections containing the groups of users in QMM to be migrated at the same time
- **Sync the collection** – the user's mail is gradually moved across onto the new platform until the two mailboxes are fully synchronised. Once achieved the mailboxes will remain in sync until the switch takes place
- **Switch the user** – each user/collection will have a switch date, this is where their on prem mailbox is switched off and they are moved onto NHSmal. This may be their existing NHSmal account or a newly provisioned one depending on whether or not they were an existing user. If the mailbox is not fully synced at the time of the switch date, the switch will not happen until the sync reports as complete at which point it will automatically switch.
- **Review issues** – If there are any issues throughout the user migration process these will be caught by the migration monitoring and issue resolution processes below.

6.2.1 Outlook Profiles

In order to streamline and improve reliability of the end-user experience we deploy new Outlook profiles for all switched users and do not migrate their existing user profiles. This minimises the risk of any incompatibilities with existing outlook configurations and the historical complexity of multiple profiles in the local estate from historic support visits etc.

The Trust should use their user comms to highlight that each user will be applied with a new profile once switched. These comms should pay attention to the following key items that do not migrate as part of this process. If required, these will need to be recreated once live.

- Any add-ons that may have been activated in Outlook
- View settings and opened panes – like calendar and to do bar, tasks.
- Email filtering
- Email categorisations
- Archive policies if any
- Message preview settings or conversation view – as in how many lines
- Signatures
- Local rules created with the Rules Wizard.
- PST files that were previously mounted.

6.3 Migration Monitoring

From the pilot onwards and throughout the full live migration process, activity will be monitored and reports delivered to the Organisation on a daily basis to highlight any issues and failures. There are 3 reports sent on a regular basis:

- **Overall Migration Report** – shows all users, their sync state, their current progress and amount of failed items
- **Failed Item Report** – contains the user and subject line

Accenture will work with the Organisation to understand any issues and agree actions to resolve. As described below, there will be actions on the Organisation as well as Accenture depending on the issue type.

6.3.1 Issue Resolution – Data Cleansing

The most common issues throughout the live migration are normally issues relating to data quality/cleansing items described as part of readiness. This is generally because they have either been missed or the issue has occurred between cleansing the data and performing the migration. Either way it highlights the importance of the readiness stage for the remainder of the project. Examples of failures could be a mailbox was over the size limit, a mailbox item was too large and a mailbox item is corrupted.

Where items fall into this data cleansing category, it will be the Organisation responsibility to assist in collating the required information in order for Accenture to resolve in bulk.

6.4 VIP Users

Previous lessons learned have highlighted that there are a number of users who should be monitored closely throughout the migration to ensure that clinical safety and business continuity is not impacted. These are classed as VIP users and can be highlighted to Accenture throughout the migration schedule so all parties understand where these users sit in the migration process. There are 2 main categories that normally are included in the VIP group:

- Senior management
- Medical secretaries

It is recommended that they are scheduled carefully i.e. are not the first users to migrate and all workstreams are aware; technical, communications and helpdesk. This will help ensure the migration runs smoothly and all staff are prepared and responsive if there are any issues.

7 Mop-up (Stage 5)

Requirements to Enter Stage: All in scope users have been through the sync & switch process

Standard Length: 2 weeks

Main Objectives: Resolve or agree a resolution for all outstanding migration issues

Exit Criteria: Reviewed and updated issues log

7.1 Stage Overview

Mop-up happens once the live migration is completed and acts as a review and resolution period for all remaining issues that came out of the migration. Accenture will work with the Organisation to either resolve the issues or create a post-live work off plan that the Organisation can continue following once Accenture have completed their work on the project.

There are various options that Organisation’s chose to utilise the mop-up phase and Accenture are happy to discuss this. These options have been outlined later in this section.

7.1.1 Stage Breakdown

The table below provides a high level overview of the week by week tasks for this stage along with the deadlines for key deliverables.

Stage Week	Organisation Activities	Accenture Activities	Key Deliverables
1	Support issue resolution	Support issue resolution Remove all forwarders Apply MX records	MX records RFC
2	Support issue resolution Confirm issues are resolved or added to post-live work off plan	Support issue resolution	Issue work off plan

7.1.2 Organisation Resource Considerations

The specific Organisation resources recommended to be involved in the implementation stage have been detailed below. Accenture will manage the overall live migration and monitoring, however, it is expected that there will be a heavy requirement for Organisation technical resource to help identify and resolve any issues as they are reported. There will also be a requirement to provide ongoing comms to keep all users informed of ongoing progress. It maybe that resource levels can be reduced as the sync and switch stage progresses. The actual levels of each resource required will vary depending on the Organisation size.

- Project Manager
- Technical Resource – Issue resolution
- Communications Lead
- Helpdesk Team

7.2 Alternative Mop-up Options

Accenture prefer to be flexible with the mop-up stage and are happy to agree the exact requirements of this stage with the Organisation while creating the migration schedule.

There are many 'mop-up' tasks that can be completed in line with the sync & switch stage and do not need to be left until this stage. For example a certain number of sync/switch failures will be fixed as they occur and this is monitored throughout the sync/switch stage (?)

It is also often beneficial to use a week of this mop-up phase in the middle of the live sync, this allows for a week free of any migration to review outstanding issues and fix items in bulk prior to continuing with the migration. This can often be a useful firebreak for the helpdesk and technical teams.

Regardless of the above, there is always a need for a certain amount of mop-up at the end of the project and at least a week of this stage will need to be reserved for the end of the sync & switch stage.

If you would like to discuss the various options for the mop-up phase then please raise with your Accenture project manager when completing the migration schedule draft as part of the readiness stage.

7.3 MX Switch

The 'Bring Your Own MX' solution allows your users to continue to receive emails on their legacy email address for a period of 6 months after your final mailbox has been migrated. The Organisation does have the opportunity to request a longer period (12 months), however, it is recommended that you focus on implementing the in-house processes to ensure users are able to move away from their legacy email addresses.

Once migrated to NHSmial, each user will have their legacy email address mapped to the NHSmial account as an alias. The configuration required to do this will be provided by the Accenture Team throughout the mop-up stage.

If the Organisation decides not to use the bring your own MX service, then any alternative will be out of scope for Accenture support.

8 Close (Stage 6)

Requirements to Enter Stage: Complete migration with all issues resolved or handed over to BAU

Standard Length: 1 week

Main Objectives: Agree service readiness, capture lessons learned

Exit Criteria: Service readiness sign off

8.1 Stage Overview

The closure stage is the final stage of the project and signifies the agreement between Accenture and the Organisation that all activities have been completed. Once this is agreed the project is considered completed and the Accenture migration team will no longer be required to support.

The Accenture project manager will also capture lessons learned and document within Accenture's overall all lessons learned log for NHSmail migrations.

8.1.1 Stage Breakdown

The table below provides a high level overview of the week by week tasks for this stage along with the deadlines for key deliverables.

Stage Week	Organisation Activities	Accenture Activities	Key Deliverables
1	Accept service readiness document Support tooling uninstall	Capture lessons learned Uninstall tooling	Written agreement of service readiness document

8.1.2 Organisation Resource Recommendations

The specific Organisation resources recommended to be involved in the implementation stage have been detailed below. The actual levels of each resource required will vary depending on the Organisation size

- Project Manager
- Technical Resource – Issue resolution
- Communications Lead
- Helpdesk Team

8.2 Service Readiness

As part of the implementation guide, there will be an embedded service readiness document. This document defines contractual project deliverables and acts as Accenture confirming to the Organisation when these were delivered and who accepted these deliverables. This notice will be provided to the Organisation at the beginning of the close stage and we will need written confirmation and acceptance of this document by the end of the stage.

8.3 Tooling Uninstall

The Accenture technical team will use the closure phase to ensure that all tooling installed for the project has been removed from the Organisation servers.

If TanSync was deployed as part of this project then this will remain installed and a handover completed with the relevant Organisation technical resources. This ensures that TanSync can be used as an ongoing synchronisation tool that supported but wasn't exclusive to the migration project.

If the Organisation provisioned additional infrastructure for this deployment then it is recommended that they also use this stage to uninstall and decommission anything that is no longer required.

8.4 Lessons Learned

As described above Accenture will capture all lessons learned for the project and input into their overall lessons learned log for future reference. This will also feed into all future deployments, but will not reference your Organisation specifically.

9 Responsibility Matrix

In order to assist the Organisation with appropriately resourcing for their project, the following table summarises the key tasks throughout the migration, highlight whether the responsibility for the task is with the Organisation, Accenture or both.

Task	Organisation	Accenture
Pre-reqs		
Define Project Dates	X	X
Resourcing	X	
Provide existing mailbox data	X	
Clean-up Active Directory	X	
Provide QMM infrastructure	X	
Business Readiness	X	
Raise License & Platform Change		X
Validate Pre-reqs		X
Sign-off Pre-reqs		X
Implementation		
Account creation		X
Distribute new user login details	X	
Track new user account login uptake	X	
QMM Install	X	X
Beta migration		X
Finalise pilot users	X	
Creation of distribution lists		X
Creation of shared mailboxes		X
Inject of delegate permissions		X
Creation of automated reports		X
Define cut off date for new user accounts	X	
Pilot		
Setup pilot collection within QMM and synchronise users		X
Validate pace of synchronisation		X
Switch pilot users		X
Review & validate the pilot migration	X	X
Go/No Go call with NHSDigital	X	X
Finalise implementation plan	X	X

Live Sync & Switch		
Remove all on premise forwarders to NHSmial	X	
Setup migration plan within QMM & sync all users		X
Monitor synchronisation for failed users		X
Resolution for synchronisation failures	X	X
Switch users according to agreed migration schedule		X
Monitor automated reports for failed items & communicate with end users	X	
Mop-up		
Report any outstanding issues	X	
Resolution of all issues	X	X
Implement MX Records switch		X
Close		
Agree service readiness	X	
Lessons Learned		X

10 Communications

Communications are a key aspect of the managed migration process. In order to ensure a successful transition, organisations must provide their users with relevant information. This section provides guidance that will be useful in the creation of your organisation's communications plan. Please be aware that organisations are responsible for the creation and distribution of all communications materials and the distribution of training materials before, during and after the migration process. The NHSmail team will be happy to provide guidance to the project team but will not be responsible for providing any information to end users.

The material outlines below should be used to help create your communications plan in line with the overall project timeline. It is essential that this plan is created in line with the readiness stage and there are clear communication milestones to meet throughout the project. A communications plan should show what communications material needs to be created, dates of when this information will be distributed and what communications methods will be used.

A poor communications plan will increase support calls, reduce user acceptance of the project and impact the overall success of the project and therefore it is worth dedicating time to this workstream through dedicated resource.

10.1 Communications Methods

Each organisation can disseminate information in the manner that is most suitable for their users. Some common methods of communications channels are:

- Posters
- Information on an online landing page
- A piece of paper attached to payslips
- Emails

The key to successful communications is to limit the amount of notifications that a user receives. The NHSmail team suggests that only crucial information be sent to users over email to ensure they are not bombarded with information that they choose to ignore.

10.2 Communications Content Tips

It is the responsibility of the Organisation to design the content of your communications however we highly recommend that you review and include the following information:

- Encourage all new users to review the new user guide (<https://s3-eu-west-1.amazonaws.com/comms-mat/Comms-Archive/portalnewuserguide.pdf>). This can be found at <http://support.nhs.net/portalindex> under **New to NHSmail?**
 - This guide will provide information about adding mobile phone numbers to the Directory. We encourage all users to do this so that they can perform self-service password resets. (Note: users can hide their mobile number from the Directory in case they do not have a work mobile and do not want to share a mobile phone)
- Prior to migration encourage all users to practice good housekeeping (e.g. deleting unnecessary emails).
- Include links to training material (included in the training section)

When sending out information to users about the passwords for the new accounts you can use MailMerge or populate this information on a local portal for a user to access when they log in. To find out how to use MailMerge refer to <https://support.office.com/en-us/article/Mail-merge-using-an-Excel-spreadsheet-858c7d7f-5cc0-4ba1-9a7b-0a948fa3d7d3?ui=en-US&rs=en-US&ad=US&fromAR=1>

11 Training

The NHSmial Support Site (<http://support.nhs.net>) provides self-service training for users. Training is available for using Outlook Web App, the Portal and Skype for Business. In addition there are guidance materials including information on setting up email on a mobile device and sending sensitive information. Refer to the links below for the individual learning series.

We suggest you share these with your users prior to migration so they can get a look and feel for their new system.

Outlook Web App: <http://support.nhs.net/owaindex>

Portal: <http://support.nhs.net/portalindex>

Skype for Business: <http://support.nhs.net/sfbindex>

11.1 Organisation Specific Training

The project team should design a training plan to define what type of training will be required and when this will be delivered. If this training plan identifies the requirement for some Organisation specific materials, the creation of these will need to be tracked and monitored alongside the overall project plan to ensure readiness.

There is more detailed information available for trainers who may want to tailor specific materials for their organisation. This can be found at:

<http://support.nhs.net/informationfortrainers>.

12 Service Desk

It is important to engage with your service desk early in the life of the project in order to agree the additional resources that will be assigned throughout the migration. It is inevitable that service desk calls will increase throughout this project and you need to prepare for this as a Organisation. On average it is estimated that there will be a 30%-40% increase in calls.

Due to this increase, there will be a requirement for additional dedicated staff to support the helpdesk throughout the migration period (and a number of weeks post migration). This support should be planned and agreed throughout the readiness stage and is a requirement for a completed pre-reqs checklist.

Obviously, any increase in this run rate will increase the above estimate, but will also decrease the amount of time any additional support will be required. Along with the speed of the Organisation infrastructure, the service desk levels are key in defining your migration run rate and needs to be carefully considered.

12.1 Reducing Call Volumes

Although there will always be an increase in calls throughout the migration, past experience can help to try and reduce these. The following table shows trends that previous migrations have seen and should be considered by your project as to whether or not you can help to pre-empt these issues

Title	Description	Recommendation to reduce calls of this type
Unread comms	Users have not actioned comms emails and therefore not registered their account. User raises a call to state they have just had a message to say they have been migrated but were unaware of the migration and don't have credentials.	Ensure comms plan is detailed and users are contacted at multiple points throughout the migration
Shared Mailboxes	Users will see shared mailboxes immediately after access but will be unlikely to fully access these. It will take 2-3 hours for all shared mailboxes and permissions to fully sync once the switch has occurred. User raises a call immediately to state that they cannot access their shared mailboxes.	Include in comms to wait for shared mailboxes to sync and only raise to helpdesk if still not working after 2-3 hours.

13 Information Governance/Clinical Safety

It is likely that the migration to the NHSmail platform will trigger your IG change control and require you IG team to review the impact of the change. Getting this agreement forms part of the readiness stage and needs to be completed in order to submit a complete pre-reqs checklist. Due to these timescales it is advisable that you involve the IG team as early as possible in order to get sign off for the project.

Although Accenture cannot advise on the exact impact the change will have on your Organisation, discussion points we have seen through previous experience include:

- Increase in staff accessing email from mobile devices
- Introduction of a 'global' address book
- Decommissioning of previously used email addresses and auto-forwarding processes
- Accenture overseas remote access requirements
- Joiners and leavers process

The above may or may not apply to your Organisation and your IG team will be required to conduct their own assessment and take the relevant actions to ensure IG compliance. It should be noted that the NHSmail Service is approved for the exchange of clinical/sensitive data in line with the National Clinical Safety Case. The Service is not intended for storage of clinical information. Organisations are encouraged to review local processes and guidance in line with the NHSmail Policies and National Safety Case. The Safety Case is available on request from feedback@nhs.net. Further details can be found at the following location:

<https://portal.nhs.net/Help/policyandguidance>

13.1 Organisation specific branding

Organisation specific branding enables identification of your particular Organisation on the national NHSmail platform. This is required to differentiate individual Organisation users and share mailboxes. There are 2 considerations for Organisation specific branding:

- **Metadata** – This is the inclusion of the Organisation name against a particular users email address. This ensures that additional information is displayed and multiple users, with the same name, from different Organisations can be differentiated. This is included by default and there is no additional requesting process required from the Organisation.
- **Shortcode** – Due to the national coverage of the NHSmail platform, it is inevitable that multiple Organisations will want to use the same name for some distribution lists. In order to make these unique, a shortcode prefix is added, however, by default, this might be a more complex code than you wish to use. If you wish to change this code to something more suitable, the Organisation is required to follow the standard NHS Digital request process. **It is highly recommended that this action is completed.**

14 Project Governance

It is recommend that the Organisation hold Monthly project boards for the duration of the project and also are included on the agenda for any relevant wider Organisation boards. These will ensure that there is the correct project governance in place and that the appropriate senior stakeholders are fully informed and inputting into the project.

Accenture will provide representation for the NHSmal project board and will request sight of this as the project moves into deployment.

14.1 Accenture Escalations

Accenture escalation contacts will be discussed throughout the project itself, however, in the immediate instance if there is a requirement to escalate any issues then please contact NHSmal.Central@accenture.com.

15 Lessons Learned

As described in the process above, Accenture completes a lessons learned session with all Organisations as they complete their migration. These are held in an overall log and the table below illustrates the top lessons for the managed migration process to date.

Category	Description	Suggested Action
Pre-requisite Tasks	Pre-requisite tasks provide vital information for the migration. If they are not completed in full then there will be a knock on impact to the quality of the remainder of the project	Complete all required pre-reqs within the required timeframe to enable Accenture to complete all checks prior to the implementation stage starting.
Commercials	Adequate time is required to process all commercial contracts and to access the necessary licenses for migration.	Ensure all commercial contracts and order forms are submitted at least 5 weeks prior to migration project start date.
Project Governance	Appropriate project governance is required to allow issues appropriately escalated if and when required.	Set out a clear escalation structure within the Organisation and provide Accenture with the key contacts.
Mailbox Matching	Organisations need to ensure that the correct on premise email address is matched to the correct NHSmal address. Incorrect information can cause data to be migrated to the incorrect mailbox.	After creating a list matching on premise email addresses to NHSmal address, an organisation should check the user report in the Portal. If a matching NHSmal account is showing under a different org code the organisation should email that user directly to ensure it is the intended person
Migration Schedule	Accenture needs to be notified of any changes to the migration schedule after it is submitted.	Send full details of the user(s) that are moving in the migration schedule including the collection you wish to move them from and the collection you wish to move them to.
Failure Rate	Due to corruption and large mailbox items there will be an expected failure rate of at least 0.01% throughout the live migration.	The Organisation should find and deal with as many of these items as possible throughout the readiness phase but also be prepared to see a certain number of failures on the daily report logs.