
NHSmail Managed Migrations Implementation Guide

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1 Introduction

NHSmail 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 NHSmail 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 NHSmail. 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.

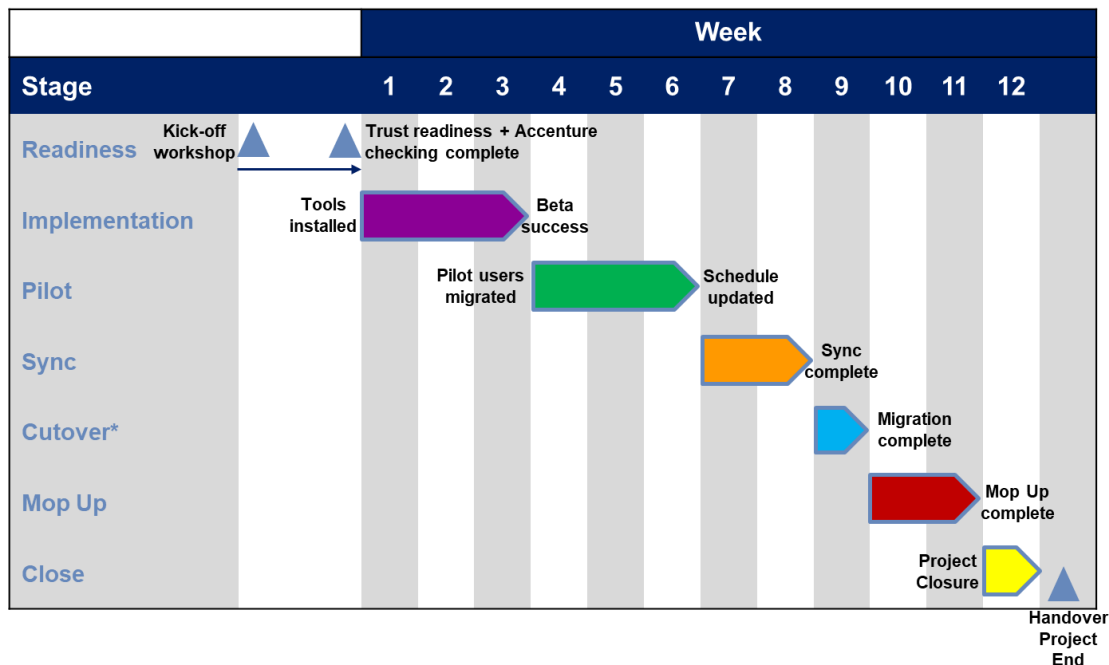
The guide provides an overview of the standard migration timeline, a detailed explanation of process and key considerations for each stage and then useful information for the key workstreams of a migration project.

1.1 Intended Audience

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

2 Example Migration Timeline

The following timeline shows the high-level plan for an example migration project. Migrations are completed using an ‘at pace’ approach with all users starting the switch process on the same day at the same time. On average, Organisations will be able to complete the pre-req activities of the readiness stage in 2-4 weeks. An example plan to achieve this is available from your Accenture project manager.



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

Implementation Stage (deployment weeks 1-3) Accenture complete the configuration of all the required tooling to complete the migration followed by beta testing of this tooling to ensure that the setup works as expected. Throughout this stage all new accounts, shared mailboxes and distribution lists will also be created.

Pilot Stage (deployment weeks 4-6) Organisation and Accenture complete Pilot testing of around 50-100 users. Once pilot is complete hold a Go/No-Go call with NHS Digital to agree to move into live copy and switch.

Copy Stage (deployment weeks 7-8) Accenture complete the live copy of all in scope users. Throughout this 2-week period Accenture monitor the copy and ensure as many mailboxes as possible reach a state of ‘Ready To Switch’.

Cutover Stage (deployment week 9) Accenture switch all in scope users at the start of this stage. The switching of all users is expected to take up to 24 hours depending on network capacity.

Mop-up Stage (deployment weeks 10-11) The Organisation submit a final mop-up file for any users missed from the original scope. Accenture process this file and complete the copy and switch for those users.

Close Stage (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-requisites required to enter deployment

Exit Criteria: Full set of pre-requisites signed off by Accenture, Licenses purchased, RFC agreed

3.1 Stage Overview

The readiness stage starts once an Organisation has signed a Top-up services agreement, Order Form, PO and returned their completed Discovery Questionnaire. Prior to these items being completed, an 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 Deployment 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 which you may have been provided with throughout the sign-up stage (e.g. pre-requisites 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-requisite tasks will take to complete. Once the pre-requisites checklist is fully signed off by the Accenture project and technical teams, 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-requisites Confirm full project team	Run Readiness Workshop Agree slot plan date	Forecasted Pre-requisites checklist aligning to slot plan date (TR)
2	Progress with Pre-requisites Attend weekly progress call	Hold weekly progress call Respond to Organisation queries	
3	Progress with Pre-requisites Attend weekly progress call Submit order form and purchase order	Hold weekly progress call Respond to Organisation queries	
4	Submit all Pre-requisites Attend weekly progress call Develop Communications & Training Plan	Hold weekly progress call Respond to Organisation queries	Full set of completed pre-requisites (TR) Communications & Training Plan (TR)

5	Fix pre-req issues raised by Accenture Attend weekly progress call	Hold weekly progress call Review Pre-requisites Raise RFC, uplift request & license order	
6	Fix pre-req issues raised by Accenture Attend weekly progress call	Hold weekly progress call Review Pre-requisites Sign-off Pre-requisites	Confirmation of readiness for implementation (AC) Licenses (AC) Approved RFC (AC) Migration Schedule (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 there is the appropriate expertise to complete the pre-requisites and involves the appropriate leads to engage the key workstreams which 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-requisites 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
- Comms considerations
- IG considerations
- Helpdesk considerations
- Migration pre-requisites
- Initial Planning – Agreeing estimates for pre-requisites
- Workshop Close & Questions

All parties should come away from the workshop with a clear understanding of what work needs to be actioned to complete the readiness stage and the dates for completion. This will be recorded into the pre-requisites 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 hold a weekly progress call. These calls are expected to last half an hour.

The calls will be project focused to track progress against the pre-req checklist. They should be attended by the NHS project manager along with the Accenture deployment team contact. They will be used to run through the pre-requisites checklist reviewing forecast dates and completion status.

Lessons have shown 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 your assigned deployment team member. A response can then be provided 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-requisites 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 is a combination of technical and project tasks required, including, but not limited to:

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

It is essential that the organisation is 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 to ensure the initial pre-requisites checklist can be completed with realistic timeframes and owners at the readiness workshop.

3.4.1 Data Quality

It is imperative that the organisation provide accurate and validated data to Accenture prior to the migration. The organisation is responsible for gathering all migration scope and providing this to Accenture through CSV files as part of the pre-requisite tasks. Accenture expect this data to be fully validated by the organisation and 100% accurate as these are the data files that will be used for the migration and will determine activities such as which mailbox will migrate where.

You will be asked to sign off on the accuracy of the data you provide and will also be asked to accept or fix any issues Accenture raise as part of their validation activities. An example validations guide can be provided but the organisation is expected to take time and care in ensuring the data is

accurate and that appropriate validations are designed and performed prior to each submission to Accenture.

3.5 Agreeing Implementation Dates

It is likely that by this point you will have held initial discussions around migration dates and any dependencies you may have. However, 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 can achieve their agreed timeline as Accenture will assign all future stage resources at the point of agreement. Any 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 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 use 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

Run rates will be reviewed at the pilot stage to confirm that the organisation infrastructure is proven for the above approach, however, it is important to review this internally through the Readiness phase and ensure any potential issues are highlighted to Accenture early on in the process.

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-requisites 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 by 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 NHSmail platform. More information can be found in **section 13** of this document.

3.7 Change Control

Once your final sets of data files have been submitted, the scope for the project is locked down, no further additions can be made to this scope prior to the live migration. However, Accenture do have a defined process for how to deal with additions and removals to the process. Further details on how any additions are processed can be found in the mop-up section of this guide.

In addition to the additions and removals processes outlined below, and as defined in the pre-requisites, a change freeze should be applied to all Portal and AD changes (for attributes submitted for the migration) for the duration of the deployment. Any changes that do get made will potentially cause the account to require descoping and adding to mop-up.

3.7.1 Additions

To minimise additions to the migration scope, local account provisioning should stop as soon as the final set of CSVs are submitted in readiness. Whilst it is understood there may be exceptions to this throughout the deployment (e.g. when a new medical secretary requires a local account to access consultant's local mailboxes/calendars), the norm should be that new starters are directly provisioned an NHSmail account and are not put in scope for the migration.

To capture any additions to the scope, Accenture will provide a mop-up template for use throughout the deployment. This should be managed by the organisation to capture any additions prior to submitting the file for processing throughout the mop-up phase. It's worth noting that these mop-up users will migrate after the main migration and will therefore be on a different platform to the rest of the organisation between the live migration and the mop-up migration. This is generally 1-3 week's dependant on when the organisation submits the mop-up file.

Any additions will need to have their new NHSmail account created by the organisation and detailed within the mop-up file. These accounts will not be bulk provisioned by Accenture and will therefore not have the new user forwarding process detailed in the implementation section of this guide.

The main expected reasons for an addition to the scope are:

- A user is found who was not included in the original scope file (usually due to incorrect data in the Organisation AD).
- A user is provisioned a local email account after the CSV file submission due to them requiring essential delegate access to another local email account.
- A user flags after CSV submission that they have incorrectly been assigned a NHSmial account (e.g. a new user on the CSV files that actually has an existing account). In this situation the incorrect account would need marking as a removal and the correct account adding into the mop-up file.

3.7.2 Removals

Removals to the scope will need to be submitted by the organisation on a weekly basis to ensure they are constantly being reviewed and processed.

The main expected reasons for a removal to the scope are:

- A user leaves the organisation
- A user flags they have been using their existing NHSmial account as their primary account and would prefer not to have their local mail migrated
- Accenture find a mismatch in pre-copy validation checks (e.g. AD values do not match to the original CSV files, a user's existing account does not belong to the organisation ODS etc.)

As the final point above suggests, Accenture will also complete descopes if they find that there are any inconsistencies between the original CSV files, the organisation AD and the NHSmial platform. If these users should still be in scope, the correct data will need documenting and submitting with the mop-up file.

Accenture will handle the descoping from the migration, the organisation will still need to follow their existing leavers process for NHSmial leavers. This will include, but not limited to, marking the user as a leaver on the Portal, removing the users shared mailbox/distribution list/delegate permission entries and handling any data (if descoped after copy has started)

3.8 Pre-reqs Checking

To enter the 2 weeks checking phases a full set of pre-reqs must be completed and submitted to Accenture. This includes:

- Final CSV submission for all required files
- Fully commented submission of the pre-reqs
- Remote access details

Once the above are submitted and all pre-reqs confirmed as complete, we enter the two-week pre-req checking phase prior to implementation, the activities included in this phase are:

- The Organisation confirming their licensing order and Accenture progressing this with BitTitan
- Accenture running final validations on the CSV files and the Organisation providing sign-off
- Accenture raise the platform RFC to gain approval from the Accenture and NHSD service teams for the migration duration
- NHSD to complete a registration uplift to ensure all new accounts can be created
- Accenture to complete final checking on all infrastructure/connectivity pre-reqs and remote access

It is vital that the organisation remain responsive throughout this period, especially to complete all required sign-offs and help resolve any issues found through the various checks.

4 Implementation (Stage 2)

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

Standard Length: 3 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.

All implementation work is carried out remotely using the access provided and tested throughout the readiness stage. 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 install and configuration, beta testing will take place to assure the installation and following the success of this testing the implementation stage will be considered complete.

Throughout this stage all new accounts, shared mailboxes and distribution lists will also be created and provided to the Organisation.

The stage takes a total of 3 weeks to complete the installation, testing and creation.

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 Send comms to Pilot users	Complete installation of tools Begin creation of new accounts	
2	Support beta testing Support provisioning	Run beta testing Finalise creation of new accounts and apply migration properties Begin creation of SMs, DLs and DPs	
3	Distribute new account details	Finalise all creation Apply migration links between NHSmail and location accounts	New account details SM and DL details Beta complete 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 MigWiz

Migration Wizard (MigWiz) is the tooling used by Accenture to perform the migration. It provides zero Impact User Experience throughout the migration process minimizing the risk and business disruption for the entire organisation. As part of the pre-requisites tasks the Organisation will have enabled OWA/EWS to be accessible to the internet (and locked down to an IP range) in order for our Migration Wizard instance to extract your email data. The specific requirements for MigWiz will be advised of during the readiness workshop.

4.2.2 TANSync

TANSync is an Identity Manager Solution which enables organisations to synchronise local people data with the NHSmail API. TANSync is available for organisations wishing to synchronize user account information into the NHSmail 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 where required, alternatively bulk CSV upload can be used for this task directly through the Portal.

4.3 Beta Testing

The beta testing will begin once all the required tooling has been configured and connectivity achieved. 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 no written feedback provided for the beta due to it being completed on 'Dummy' data and designed to be more of a problem-solving task on the installation. However, 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.

4.4 Provisioning New Accounts

All new NHSmal accounts need to be provisioned within the implementation stage. Once this has been completed the Organisation's leavers and joiners process, defined as part of the pre-requisites checklist, will need to be followed for all new joiners and leavers.

Once accounts are provisioned the user has 90 days to log in, accept the AUP, complete their security questions and change their password. If this is not completed within the required timeframe, the account will be locked and will be un-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 to allow for mail merging should the Organisation want to send out account detail communications in bulk.

It is advised that the Organisation monitors staff uptake closely to ensure that issues are reduced throughout copy & switch. The main switch should not happen until at least 80% of new users have logged in and accepted the AUP.

4.4.1 New Account Migration Properties

For all new accounts created by Accenture through the implementation stage, specific properties are set on these accounts. This helps reduce the likelihood of receiving email from external sources while the account is in a migration state and not being monitored by the end user. The following properties are set:

- The accounts are hidden from the NHSmal Global Address List (GAL)
- A MailTip (visible to a sender) is placed onto the account to state that the account is currently going through migration and is not being monitored

Both of the above are reversed at the point for switch to ensure the account is in a normal state once the user begins to use the account as their primary email address.

No forwarder is placed on the newly created account due to the addresses being hidden from the GAL and a MailTip stating it is not in use. Replying to previous emails once migrated deliver directly to the original address so there is no LEDN internal resolution on migrated emails. If users distribute their new address prior to the go live date and people begin to use this, the user needs to be aware that this mail will end up in their unused NHSmal address. Any concerns with missed mail during this period can be discussed with your Accenture project manager, however, it is strongly recommended that communication methods are used to inform users of the process.

4.4.2 Existing Users

The approach above is applied to new users only, existing NHSmal accounts are not impacted and will not have the migration properties applied. Existing users of NHSmal are already expected to be checking their account and should continue to do so throughout the deployment.

The appropriate communications 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 local 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.

5 Pilot (Stage 3)

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

Standard Length: 3 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 a small subset of user accounts. The stage lasts 3 weeks, with at least one of those weeks being utilised by the users themselves to test the migration and highlight any issues. All issues are then investigated and either fixed or explained to provide the confidence to progress into the live copy.

The number of users required to take part in the pilot is 50-100. These users are defined in the readiness stage and provided through a CSV file. It is recommended that the Organisation choose a couple of self-contained departments for the pilot to reduce the impact of working across 2 platforms and ensure **all members of any pilot shared mailboxes are migrated at the same time**. 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 copy & 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	Ensure all pilot users have logged in and accepted AUP Support issue resolution	Copy pilot users Investigate and fix raised issues	
2	Review testing on user accounts Support issue resolution	Switch pilot users Investigate and fix raised issues	
3	Complete testing on user accounts Support issue resolution Attend Go No Go call Send final user comms	Complete the migration of additional pilot users Investigate and fix raised issues	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 different desktop profiles to ensure issues are found across all your setups
- Senior management should not be included in the pilot
- Do not limit the pilot to just the IT department, this won't give a realistic representation of the rollout

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 and shared mailboxes 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 copy and switch to validate the migration processes on the Organisation's infrastructure. Any migration tooling 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 and investigate any local issues.

5.3.1 Migration Speed

Throughout the pilot copy, switch and initial user login, the organisation should monitor their network statistics to ensure there is suitable capacity to run the live migration. Accenture will also monitor the MigWiz statistical reporting functionality and will highlight any data transfer speed issues which are deemed to be considerably slower than expected.

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 which may 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 which 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

To progress into the copy 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 Live Copy & Switch (Stages 4 & 5)

Requirements to Enter Stage: Authority to proceed from Go No Go call

Standard Length: 2 weeks for copy followed by an agreed day for switch

Main Objectives: Perform the live migration

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

6.1 Stage Overview

Copy and switch are the live migration stages. 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 action taken to either fix or place into the mop-up stage.

The length of the copy & switch stage is a two-week period, followed by an agreed date for the switching of all users (during the week following the copy period).

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
1	Provide ongoing comms Support issue resolution Provide user helpdesk support	Put all users into live copy Investigate & fix copy issues	MigWiz Monitoring reports
2	Provide ongoing comms Support issue resolution	Investigate & fix copy issues Set live switch time	MigWiz Monitoring reports
3	Provide ongoing comms Support issue resolution Provide user helpdesk support	Provide onsite support for switch day Remotely assist with follow-up issues	MigWiz Monitoring reports
4	Provide ongoing comms Support issue resolution Provide user helpdesk support	Remotely assist with follow-up issues	MigWiz 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, 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 communications to keep all users informed of ongoing progress. It maybe that resource levels can be reduced as the copy 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 projects** – Create all projects containing the groups of users in MigWiz to be migrated at the same time (max 1000 users per MigWiz project).
- **Perform Full Copy** – the user's mail is gradually moved across onto the new platform until the mailbox is fully copied.
- **Switch the user** – Once the switch date arrives a final delta copy is completed, and the user is moved onto NHSmail through the creation of a new profile via a group policy update. This may be their existing NHSmail account or a newly provisioned one depending on if they were an existing user. The local account will then have a forwarder applied to forward all mail onto the new nhs.net address.
- **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

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 communications to highlight that each user will be applied with a new profile once switched. These communications 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 (test will migrate but will need reattaching)
- Local rules created with the Rules Wizard.
- PST files that were previously mounted.

In addition to the above, specific items that are important to you as an organisation should be reviewed carefully at the Pilot and any specific instructions added into the live user communications. Outlook has the ability to store various configuration items both locally and server side depending on the setup, so it is important these are reviewed as local items that are stored within the user's profile will not migrate.

6.2.2 GPO Configuration

At the point of migrating a user we use an automated process that creates a new Outlook profile for the migrated user and populates it with the correct settings for this user. The only action the user needs to take at this stage is to input their nhs.net address password. The process uses PowerShell

scripts and a group policy to create a new Outlook profile for the user when they login after they have been switched.

6.2.2.1 GPO Switch Process Overview

The following steps highlight the high-level process of switching with the GPO in place:

1. Switch initiated by MigWiz
2. Switched user has target address applied on-prem to NHSmail
3. Switched user's mail property updated with NHS.net address
4. Switched user is added to NHSmailMigratedUsers security group to apply the group policy
5. The machines should be connected to a fixed ethernet cable during the next steps to ensure that the GPO can be downloaded and installed successfully. This is not guaranteed over a WIFI connection.
6. User is instructed to log off / restart computer via switch message
7. User is now in scope for the NHSmailMigratedUsers GPO as they have been added to the security group to apply this
8. GPO creates three mail profile specific registry keys. These create a new blank Outlook profile, set the new profile to default and bypasses user option of selecting which mail profile to load
9. GPO creates additional registry keys that block auto discover access via SCP, standard DNS namespaces and SRV record
10. GPO adds in Credential Manager a new entry named autodiscover.nhs.net containing the user's NHSmail email address and a false password. This will be used during the Outlook profile setup
11. User opens Outlook and is presented with credential request pop up
12. Username is automatically filled in with NHS.net address of the user
13. User enters NHS.net password and the process is complete.
14. The Outlook client will then start the process of mailbox rehydration and your mailbox data will start to appear in the following order
 - a. Calendar Items
 - b. Mailbox Items
 - c. Shared Mailboxes

A more detailed review can be found in the following Microsoft support page link:

<https://support.microsoft.com/en-us/help/2686906/order-of-folder-synchronization-for-outlook-2007-and-for-outlook-2010>

15. GPO, at logoff, will remove the new entry added in Credential Manager, autodiscover.nhs.net, preventing any issues, password related, moving forward.

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 daily to highlight any issues and failures. There are 2 reports sent on a regular basis:

- **Overall Migration Report** – shows all users, their copy 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's responsibility to assist in collating the required information in order for Accenture to resolve in bulk.

There may be a very small number of mailboxes that contain corrupt data which cannot be fixed and MigWiz will not process. If these occur, Accenture will advise a manual migration approach for these users to be completed by the Organisation.

7 Mop-up (Stage 6)

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

Standard Length: 2 weeks

Main Objectives: Resolve or agree a resolution for all outstanding migration issues, process mop-up file including any additions to the scope

Exit Criteria: Mop-up users migrated

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 in 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 Reverse migration properties	
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 communications to keep all users informed of ongoing progress. It maybe that resource levels can be reduced as the copy 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 Mop-up File

The mop-up file is a list of all users who you wish to migrate through the mop-up period, these are the users that you have highlighted as additions through the change management process outlined in the readiness section. You should keep this file as an ongoing document throughout the deployment, so it is updated as and when any additions to the migration are confirmed.

The mop-up file can only be submitted once and if any additions are found after the point of mop-up, the organisation will need to manually migrate these users.

The mop-up file will be processed in the same way as the pilot and mail migration:

- Validated Mop-up file submitted by the Organisation
- Accenture complete internal validations and return to Organisation for sign off
- Organisation confirm all flagged discrepancies and complete sign off for mop-up file
- Accenture set up mop-up collection and place the users into copy
- Accenture monitor and complete issue resolution on copy
- Mailboxes switch on agreed date and time

The normal timing for submission of this file is 1-3 weeks after the main migration. There is then around a week of processing time for the above activities before the users can be migrated.

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.

When the Organisation wishes to switch their MX Record, please raise a request to the Feedback mailbox (feedback@nhs.net) to state that you have just completed your NHSmail managed migration and which to implement the Bring Your Own MX solution. The feedback team will then provide a mapping template for you to detail the list of local addresses matched to the NHSmail addresses.

Once this is returned, the Feedback team will coordinate with the national helpdesk to raise an RFC and test the MX switch. Once approved, the Relay team will be in contact to arrange a suitable time and date to implement the change.

8 Close (Stage 7)

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 documentation 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 Decommission tooling	Written agreement of service readiness document

8.1.2 Organisation Resource Recommendations

The specific Organisation resources recommended to be involved in the closure 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 documentation for future reference. This will also feed into all future deployments but will not reference your Organisation specifically.

9 Responsibility Matrix

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-requisites		
Define Project Dates	X	X
Resourcing	X	
Provide existing mailbox data	X	
Clean-up Active Directory	X	
Provide single migration server infrastructure	X	
Business Readiness	X	
Raise License & Platform Change		X
Validate Pre-requisites	X	X
Define cut off date for new user accounts	X	
Sign-off Pre-requisites		X
Implementation		
Account creation		X
Distribute new user login details	X	
Track new user account login uptake	X	
MigWiz Configuration	X	X
Beta migration		X
Creation of distribution lists		X
Creation of shared mailboxes		X
Inject of delegate permissions		X
Creation of automated reports		X
Pilot		
Setup pilot collection within MigWiz and copy users		X
Validate pace of copy	X	X
Switch pilot users		X
Review & validate the pilot migration	X	X
Go No Go call with NHSDigital	X	X
Live Sync & Switch		
Reverse migration properties	X	

Setup projects within MigWiz & copy all users		X
Monitor copy for failed users		X
Resolution for copy failures	X	X
Switch users according to agreed migration schedule		X
Monitor automated reports for failed items & communicate with end users	X	
Mop-up		
Submit mop-up file	X	
Migration mop-up file		X
Close		
Agree service readiness	X	
Lessons Learned	X	X
Raise MX Records switch	X	

10 Communications

Communications are a key aspect of the managed migration process. 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 outlined 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
- Desktop Image
- Drop in's
- Floorwalking
- Chief Exec Briefings
- Team Meetings

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.

Existing material updates should also be considered:

- Websites
- Policies/procedures
- Flyers
- Posters
- Business Cards
- Stationary

10.2 Communications Key Messages

Your communications plan should not be limited to just these messages; however the following provide some essential communications that should be distributed throughout the migration. You can further discuss the timing of these messages with your Accenture project manager.

10.2.1 All User Communications

The following messages should be provided to all users in scope for the migration:

- **General Communication around NHSmial** – to send out general communications to let staff know the organisation is migrating across to NHSmial.
- **Users Switch Date** – To communicate to users a week, 3 days and 1 day prior to them migrating so they are aware and have completed all tasks needed in readiness for migration.
- **Switch Process** – Setting the expectation to the end users of the process they will need to take when they are notified they are switched (Outlook vs OWA).
- **Pilot Users Only** - To inform pilot users that the full NHSmial GAL will not be available until the Live switch date for the organisation. This is due to new accounts being hidden from the GAL to prevent platform users from sending to an NHSmial address that aren't in use.

10.2.2 New User Communications

The following messages should be provided to all new NHSmial users in scope for the migration:

- **Login Details / AUP** – You will need to cascade all of the new user's login details so that they can reset their password, complete the security questions and complete the AUP. It is vital to push this out to users and ensure they do this. The more staff that reset their password and accept the AUP the less calls there will be to the helpdesk. A lot of the calls to the helpdesk during the migration will be new users who have not logged into NHSmial to reset their password or accept the AUP. (At this point the organisation can also push out the use of the self-service password reset if a user enters in their mobile number). AUP acceptance is required to be at 80% prior to a live migration switch activity – this should be monitored through NHSmial mailbox reports on a regular basis once the initial communications has been sent out.
- **New User Mail Routing** – Inform users that they should not ask people to use their new email address until they have switched. New accounts have no forwarders on and therefore any mail sent to their NHSmial address will remain there. Users should also be notified that their newly provisioned account will be hidden from the NHSmial GAL until go live.

10.2.3 Existing User Communications

The following messages should be provided to all users in scope for the migration who already have an existing NHSmial account:

- **Account Details** - Emails and passwords will stay the same – existing users should log in to ensure they have not forgotten any of their details.
- **Monitoring Emails** - As people move onto NHSmial they will be using the NHSmial address book and on-premise emails will automatically try to be resolved to their NHSmial equivalents. For existing users, this could mean an increase in mail to their NHSmial box. Please ensure existing users monitor their NHSmial account.
- **Copying** - As we start the copy process for an existing user (usually ~1 week prior to the user migrating) they will start to see their local mail appear in their NHSmial account. It is very important that these items are not deleted from the NHSmial account as they will not copy again with the delta.
- **Profile** - If the user is currently using Outlook for their NHSmial they will have a new profile applied (as with all new users) so their user experience of what goes and what stays will be the same as a new user.
- **Contacts** - Any user created contact within NHSmial with on-prem addresses should be removed so they are not used in the future.
- **Forwarding Rules** - Forwarding rules between the two accounts should be removed if they exist as the migration will ensure that all mails from the local mailbox are migrated into the NHSmial account.

10.2.4 All User Communications – Switch Preparation

The following messages should be provided to all in scope users as information for once they have completed their switch:

- **Shared Mailboxes** – Shared mailbox access can take longer to download and for the permissions to propagate therefore users should leave it a couple of hours before logging a call with the helpdesk. This will reduce unnecessary calls to your helpdesk.
- **Escalation Route** – To confirm to the end users to contact your helpdesk if they believe they have any migration queries/issues so that these can be resolved.
- **OWA Availability** – If users are having issues with outlook they can access NHSmail via OWA as an alternative.
- **Permissions** – No folder level permissions or ‘full-access’ are migrated. This includes access to other user’s calendars. If a user wishes to reapply this permission, then this can be actioned by the user once live.

10.3 Example Communications Timeline

To assist with the creation of the Organisation’s communications plan, an example timeline is detailed below to outline the key essential messages. This should only be taken as an example and the Organisation should develop their own timeline and plan in accordance with their local requirements.

NHSmail Migration Example Comms Timeline													
	Ongoing leaver and joiner comms												
Initial 'NHSmail is coming comms' Existing user email data gathering Creation of detailed comms plan for the deployment (inc. posters, intranet updates, manager briefings etc.)	Provide project details and guide date to all users LOA comms for project rules		Inform all new users of their details and key messages Inform all existing users to log in and check access	Chase AUP acceptance Inform pilot users of sync starting and switch date	Update Live comms with pilot experience learnings	Chase AUP acceptance Inform all users of sync starting	Chase AUP acceptance	Send final Live migration comms with switch start date Chase AUP acceptance	Inform all switched users that migration is complete Ensure there are no users left on local email	Send user details, dates and comms to mop-up users		Inform all mop-up users that migration is complete	Send project closure comms
Pre-deployment	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13
Readiness	Implementation			Pilot			Sync		Live		Mop-up		Close

10.4 Other Platform 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 NHSmail 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 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 an Organisation. Some estimated average figures are below:

- On average 30 – 40% of the users switched on that day ring up the helpdesk, if the calls are not cleared this will then of course continue to grow day on day until the migration is complete
- Of these calls on average 60 – 70% are password related/AUP related
- Of these calls on average 20% are profile related
- The rest tend to be recopy/request to be migrated/general NHSmail questions

Some real examples from past projects include:

- **Project A** - For every 1000 users switched the organisation received an average of 350 calls
- **Project B** - A total of 5000 users switched, 800 calls on day one and after a month levelled back out to normal levels
- **Project C** - For every 300 users switched the organisation received average of 111 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-requisites 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	User raises a call to state they have just had a message to say they have been migrated but were unaware of the migration.	Ensure comms plan is detailed and users are contacted at multiple points throughout the migration
AUP Acceptance	User has never logged into their account and not accepted the AUP prior to switching. Once switched, the user cannot access their NHSmail credentials as they are in their old mailbox.	AUP acceptance needs to be at 80%+ prior to live switching – this ensures that users know their credentials and activate their mailbox prior to going live. Many organisations also place the user's credentials on their secure home drive and use a

		recorded message to point people towards this of go live day.
Profile Issues	Users cannot log into Outlook as their profile is corrupt due to cancelling out of the creation process	Use a recorded helpdesk message to ask the user to access their email through OWA then call back at a quieter time – this ensures the users work isn't impacted.
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 to enable submission of a completed pre-requisites checklist. Due to these timescales it is advisable that you involve the IG team as early as possible 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 user's 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. To make these unique, a short code 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.

14 Project Governance

It is recommended that the Organisation hold Monthly project boards for the duration of the project and are also 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 NHSmail 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 your project manager.

15 NHSMail Spoofing & Application Service Accounts.

During the migration process the Organisations accounts will have a forwarder placed on the account post Go Live within your local domain. This will forward any emails sent to the users old on-prem email account to their new NHS.net mailbox. To prevent these emails as being tagged as spam by the NHSMail filters we add the Organisation to a transport exclusion rule, resulting in the emails being delivered to the user's inbox.

It should be known that the Organisation must review any internal applications accounts set up to manage emails from such items as printer's and other devices, these should not spoof the nhs.net email accounts they must confirm to the following guidance to ensure that when the transport rule is removed as part of the Organisations request for the NHSMail MX solution that the emails are delivered successfully from these devices.

Further information can be found on the spoofing controls at the following link:

<https://s3-eu-west-1.amazonaws.com/comms-mat/Training-Materials/Guidance/SpoofingcontrolsontheNHSmailservice.pdf>

16 Lessons Learned

As described in the process above, Accenture completes a lessons learned session with all Organisations as they complete their migration. The top lessons for the managed migration process to date are shown below.

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-requisites within the required timeframe to enable Accenture to complete all checks prior to the implementation stage starting.
Technical Issues	It is possible that local issues will be found throughout the implementation phase of the project that will require local expertise to help diagnose and resolve.	Ensure that sufficient technical resource from the Organisation is assigned to the implementation stage of the project to support Accenture without causing a delay.
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.
Live Comms	Local differences of using Outlook can cause different migration behaviour e.g. if rules are stored locally rather than server side.	The Organisation should ensure that the Pilot user experience is carefully reviewed, especially against Outlook functionality that is used heavily within that Organisation. Anything found should be added in to the final Live user comms.
Data Quality	Organisations need to ensure that the correct on-premise email address is matched to the correct NHSmail address. Incorrect information can cause data to be migrated to the incorrect mailbox.	Ensure there is a full validation plan in place at the Organisation to provide high quality data to Accenture through the readiness period.
Roaming Profiles/VDI	Roaming profiles and VDI solutions that redirect the OST file are not supported by the migration and will cause issues with the GPO configuration and Outlook cached mode (a requirement of the NHSmail platform)	All users should be aware that if they are an VDI or roaming profile user, then they will need to use OWA rather than Outlook to access their email.

Scope changes	Allowing scope changes throughout the project reduces data quality and adds IG risk as the data does not remain static.	No users to be added to the live migration once the CSV files are signed off in readiness. Any additions from this point need to go into a single mop-up file.
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.