



Health & Social Care
Information Centre

NHSmail 2 Trainer Briefing

March 2016



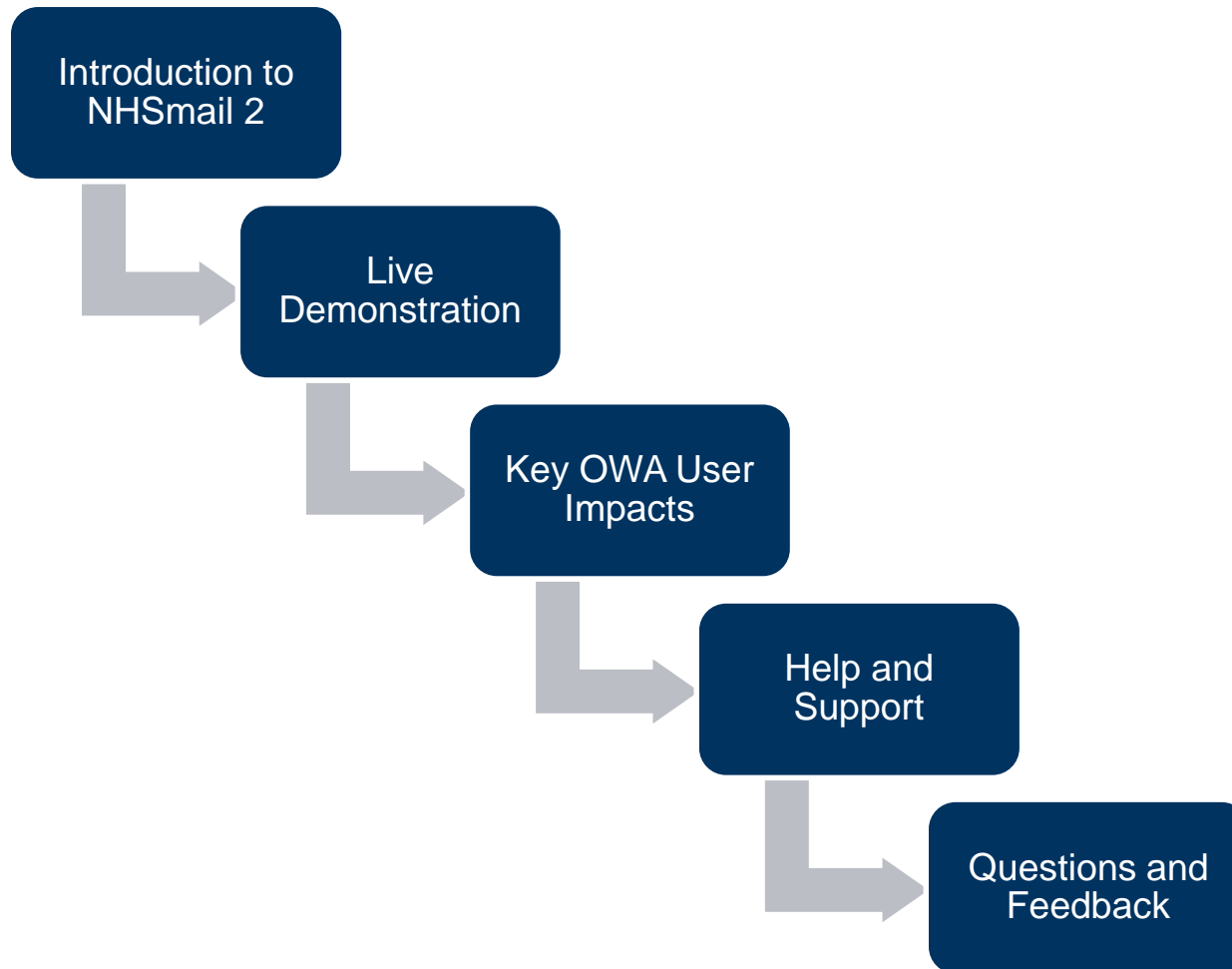
Objectives

By the end of this session, you will:

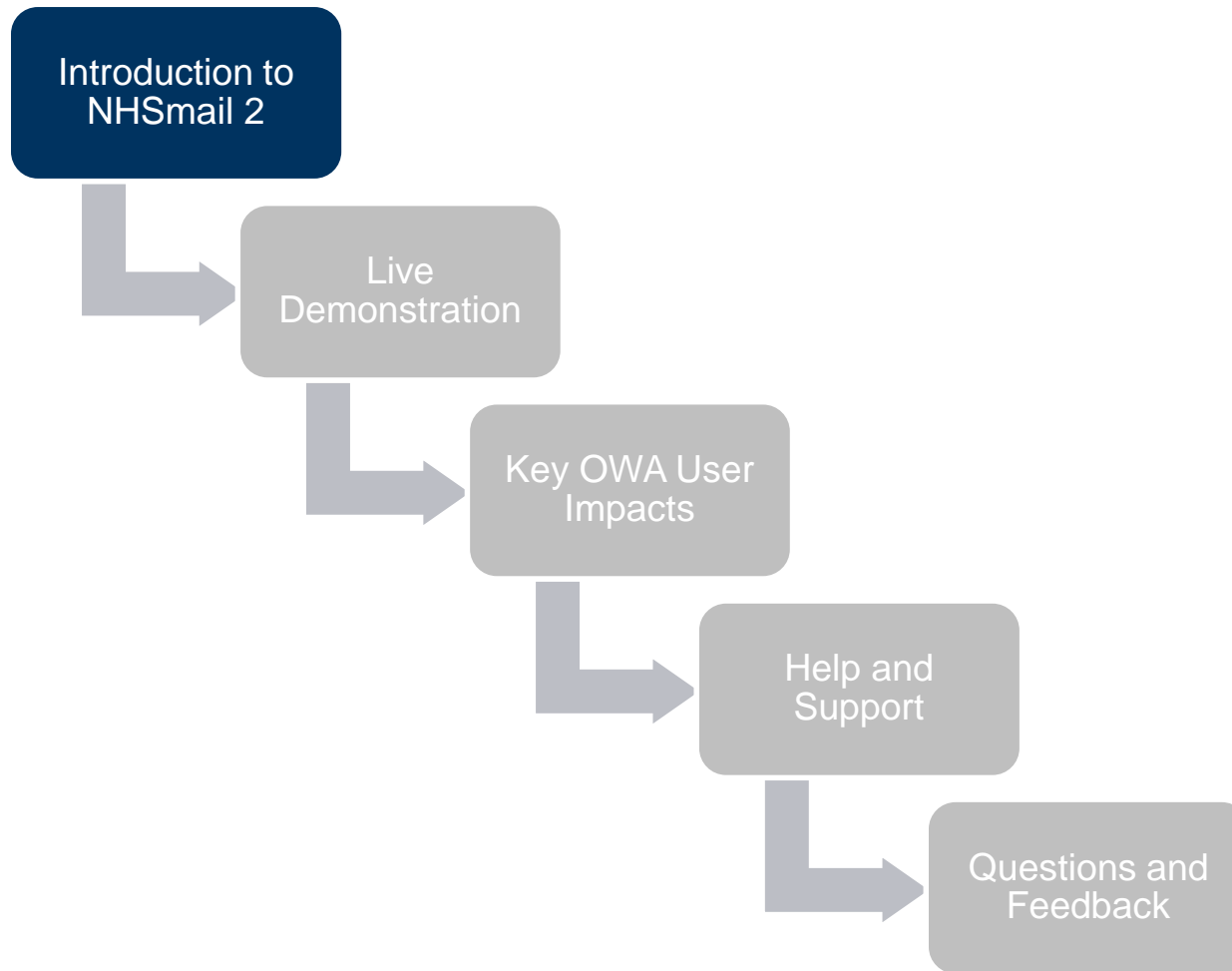
- Understand the NHSmail 2 service and training solution
- Know how to get the best out of the Outlook Web App (OWA) training products, including training videos, Quick Reference Guides (QRGs), the User Guide and other guidance documents
- Be able to provide training support for users of OWA
- Understand the impact of transition on end users



Agenda



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What is NHSmail 2?

- NHSmail 2 is the replacement NHSmail service for England and Scotland
- NHSmail 2 core service will include:
 - Upgrade to **Outlook Web App (OWA) 2013**
 - Roll-out of **Instant Messaging and Presence**
 - Release of a **new portal for users and Local Organisation Administrators (LOAs)**
 - Improvement of the **NHS Directory**
- Accenture, the Health and Social Care Information Centre (HSCIC) and NHS Scotland are currently preparing for transition to NHSmail 2
- Further information on transition activities can be found on the [HSCIC website](#)

What is included in NHSmail 2?



Email

- Email Gateway and Relay Service
- Outlook Web App (OWA)
- 4GB Mailbox



Self-service Portal

- Training and Guidance
- Directory
- Mobile Device Management
- Administration Tools



Skype for Business

- Presence Management
- Instant Messaging

What are the NHSmail 2 additional services?



Email

- Data Retention Top-Ups
- 6GB, 10GB, 25GB Mailbox



Skype for Business

- Desktop Sharing
- Audio & Video Call

Additional services will be available after transition and can be obtained at an organisational level at an additional cost.

Moving to NHSmail 2

Greater collaboration capabilities this way

August 2016 – **Portal Go Live**
The new NHS Directory, user and administration tools will become available

From July 2016 – **Transition Mop Up (LOAs)**
All remaining users to be transitioned

May – July 2016 – **Bulk Transition**
Main period of transition of accounts

April 2016 – **Transition Pilot**
This Transition Pilot will take place over a short period of time and is anticipated to pilot the user experience and the migration tools

March/April 2016 – **Trainer Briefing**
Training support to be delivered to Trainers and LOAs

What is the NHSmail 2 training approach?

Structure of the training approach

Learning Series: a collection of training modules for each component of the NHSmail 2 service – e.g. Outlook Web App

↳ **Module:** a collection of materials about specific functions – e.g. Sending and receiving emails

↳ Modules will typically include a **Quick Reference Guide (QRG)** and **Training Video**

Structure of the training materials

- Training materials will be available from the new **NHSmail 2 Portal**
- The pages are designed to enable the intuitive navigation between the learning series and modules and will be **mobile friendly**
- Users will be able to access the materials 24/7, 365 days a year and complete the learning at their own pace

What is included in NHSmail 2 training?

Learning series



**Outlook Web App (OWA)
Learning Series**



A collection of modules on using Outlook Web App 2013.



**Skype for Business (SfB)
Learning Series**



A collection of modules on using SfB Instant Messaging and Presence for Desktop users



Portal Learning Series



A collection of modules on using the new NHSmail 2 administration portal



Guidance



A collection of materials on technical aspects and the policy governing the NHSmail 2 service

NHSmial 2 training modules

OWA Learning Series

Email

- **Navigating around OWA**
 - Understand and navigate the key components available in OWA
 - Navigate the settings page in OWA
 - Understand OWA Help
- **Sending and receiving emails**
 - Send and receive emails
 - Send emails using directory contacts
 - Reply to emails
 - Forward emails
- **Advanced email use**
 - Set an email's priority and sensitivity
 - Download attachments and send emails with attachments
 - Set up an mail signature
 - Set an automatic reply (Out of Office)
- **Read and delivery receipts and Bcc**
 - Request read and delivery receipts
 - Hide the details of email recipients
- **Viewing and finding emails**
 - Organise your emails in a view that is preferable to you
 - Locate emails within your mailbox
- **Mailbox management**
 - Create and organise emails into folders
 - Understand and manage your mailbox quota
 - Categorise emails
- **Advanced mailbox management**
 - Set up rules to manage your inbox
 - Set up and use shared folders with colleagues
- **Delegated and shared mailboxes**
 - Manage a delegated mailbox
 - Manage a generic mailbox

NHSmal 2 training modules

OWA Learning Series

Calendar

- **Calendars, appointments and meetings**
 - Create appointments and meetings
 - Update meetings and understand the options for providing notifications to meeting attendees
 - Use the Scheduling Assistant to view other users' availability
 - Manage calendar invitations
 - Delete or cancel meetings or appointments
- **Sharing calendars and calendar permissions**
 - Provide access to your calendar information to others and set up permission levels
 - Open other calendar to which you have been given access

Tasks & Reminders

- **Managing tasks and reminders**
 - Create and manage tasks
 - Create and manage reminders

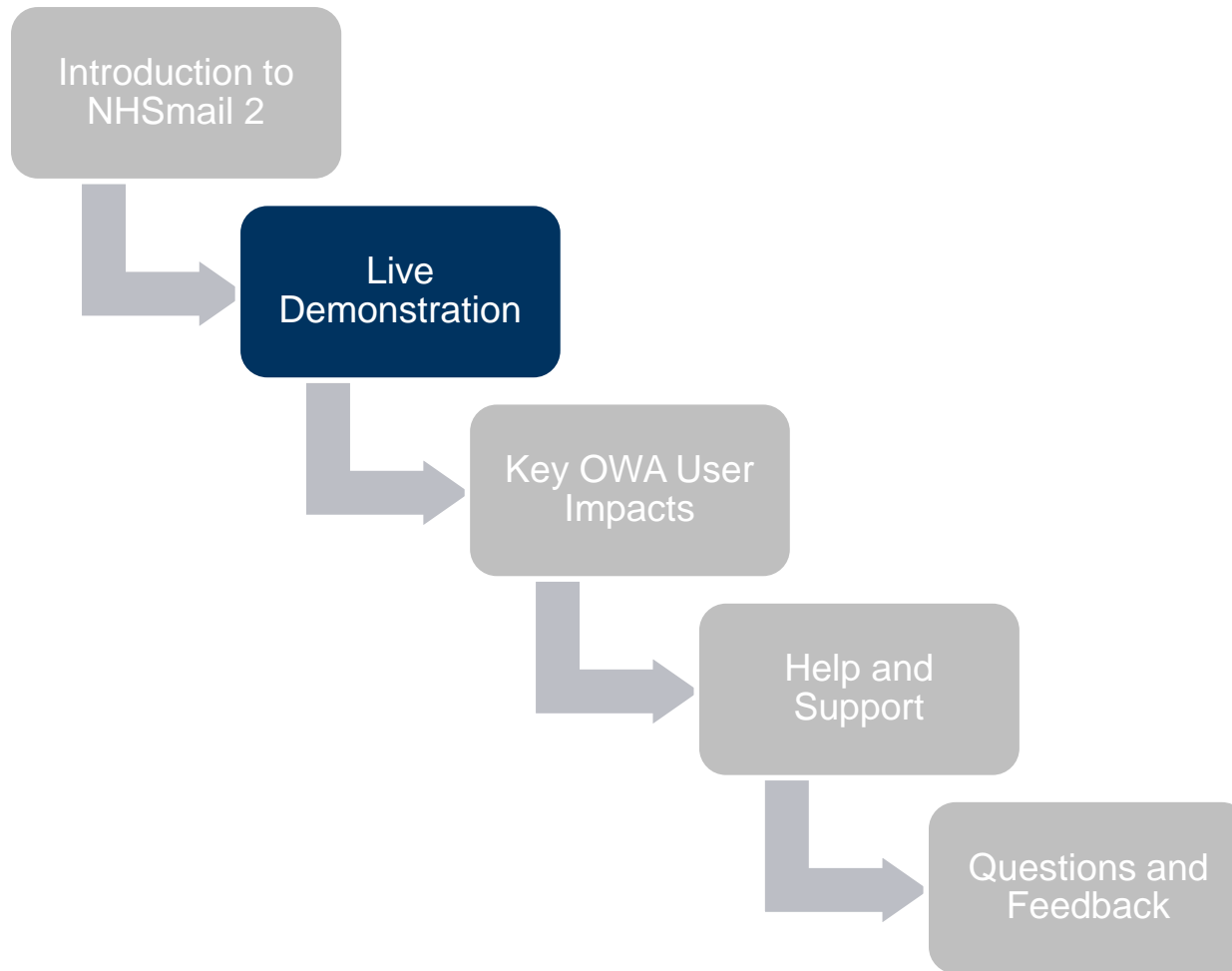
Contacts

- **Managing contacts**
 - Find and add contacts from the Directory
 - Create new contacts
 - Manage your contacts
- **Managing distribution groups and contact lists**
 - Create distribution groups
 - Manage distribution groups
 - Create and manage personal contact lists

Instant Messenger

- **Outlook Web App Instant Messenger**
 - Sign in and sign out of Instant Messenger
 - Understand the presence management feature of Instant Messenger
 - Use instant messaging

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Live demonstration

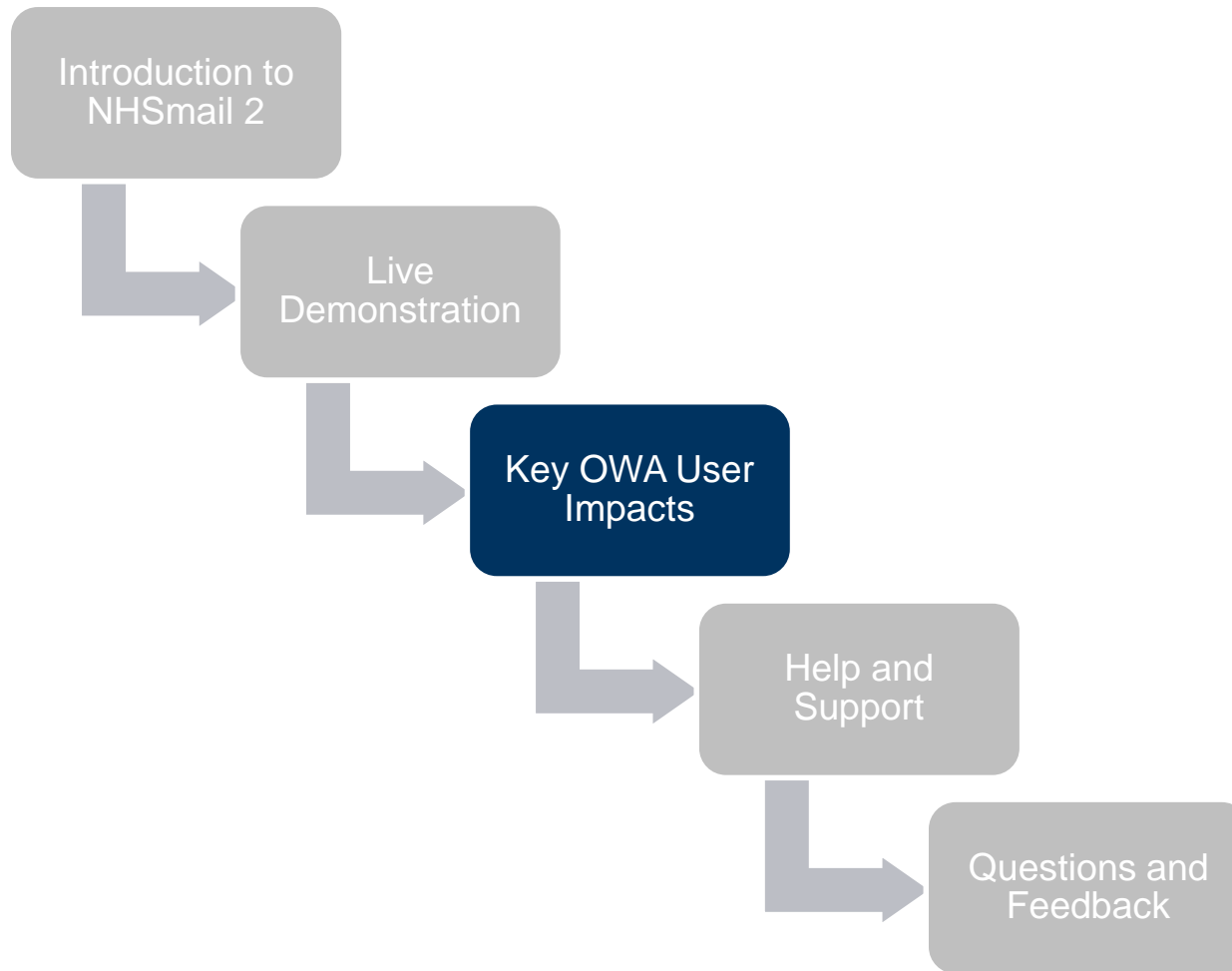
OWA Live Demonstration



Following this demonstration you will be able to:

- View and receive emails (using QRG and training video)
- Send and receive instant messages within OWA (using QRG and training video)

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Key user impacts

Prior to account transitioning

Interim Helpdesk Process

- Users may need to repeat information if transferred between the NHSmail and NHSmail 2 Helpdesk during transition.
- User may not be able to contact the Helpdesk by telephone for a very brief period of time during the week of 2nd April when the cutover of the helpdesk telephone numbers occurs. This is unlikely to be more than several minutes. Users should call back after 5-10 minutes or email the helpdesk (helpdesk@nhs.net).

After account has transitioned

NHSmail Portal Transition State

- Users will be presented with a new way to navigate around the NHSmail 2 applications following logging in. A demonstration of this experience will be coming soon.

Shared Folders

- Users will need to re-add their Shared Folder subscriptions to their mailbox in OWA (simple right-click action). Users will be provided with guidance on screen and the ability to see which Shared Folders they have access to.

Key user impacts

After account has transitioned

Shared (Generic) Mailboxes

- Users will access Shared Mailboxes through OWA. Users will be provided with guidance and the ability to see which Shared Mailboxes they have access to. Shared mailbox owners will not need to re-add permission levels.

New OWA features

- Instant Messaging and Presence in OWA will be enabled for all users.
- Access to improved calendar features in OWA – for example, side-by-side view of shared calendars.

OWA features that will no longer be available

- Users will no longer have the Notes functionality.

Browser Compliance

- Users using unsupported browser versions (e.g. Internet Explorer 7) will not receive the full capabilities of OWA and will not be able to use tools such as Instant Messaging. Full guide available on user experience differences.

At Portal Go-Live

- Users' mailbox quotas will be upgraded to 4GB.
- Training and Guidance will be accessed via the NHSmail 2 Portal without needing to log in or be on N3.

Key OWA user impacts summary

Prior to account transitioning

- Helpdesk Cutover Impact and Processes

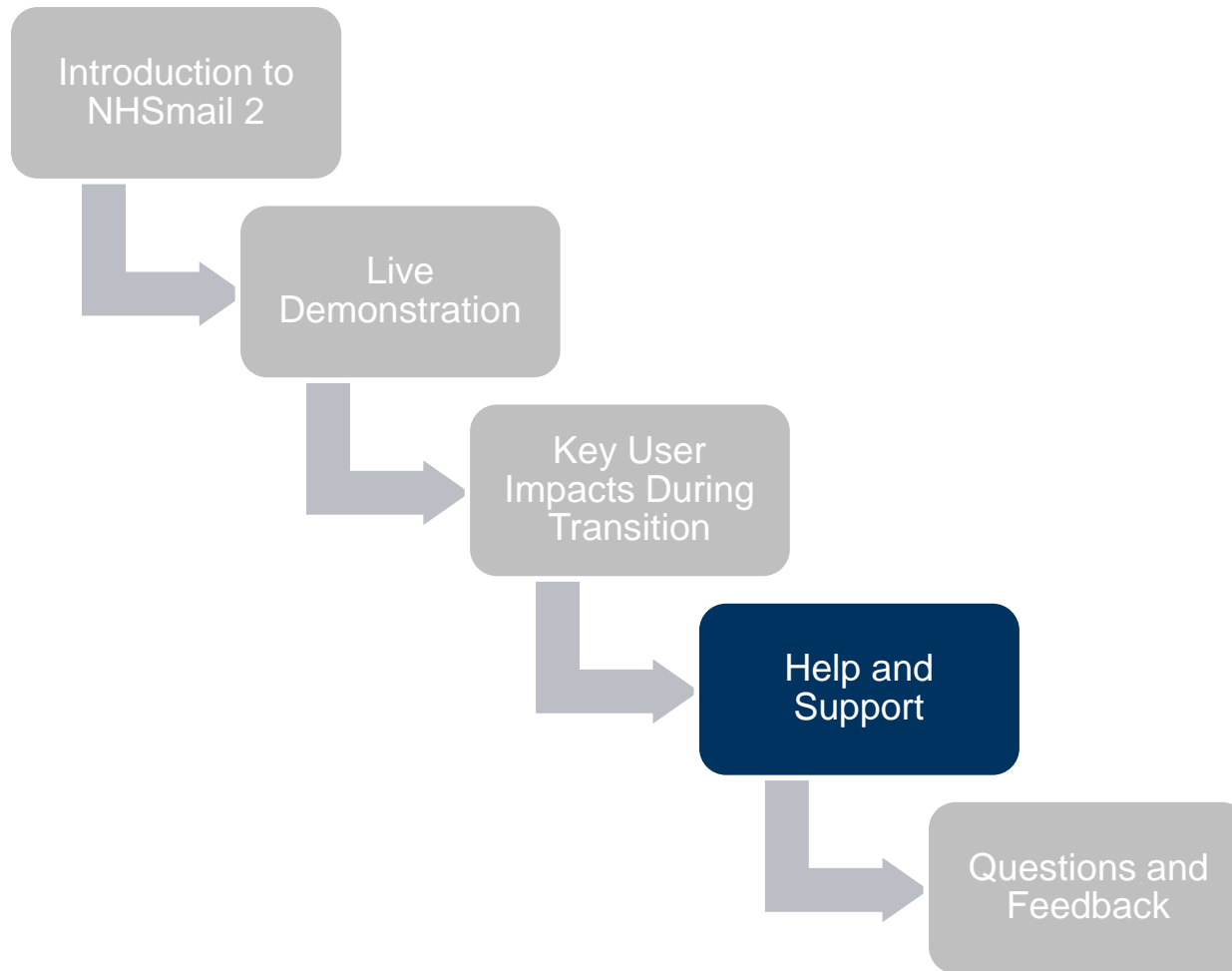
After account has transitioned

- NHSmail Portal Transition State
- Shared mailbox/folders
- Instant Messaging/Presence
- New Shared Calendars Experience
- No Notes
- Browser Compliance

At Portal Go-Live

- 4 GB Mailbox
- Training and guidance available on NHSmail 2 Portal (no login needed)

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Help and Support

Resources:

Transition training pages: <http://support.nhs.net>

Quick Reference Guides

(A quick step-by-step guide to the functions of Outlook Web App, Skype for Business and the Portal)

User Guide

(A detailed guide to all functions of Outlook Web App, Skype for Business and the Portal)



Training Videos

(A short video for each module within the Learning Series, reflecting the Quick Reference Guides)

Guidance Materials

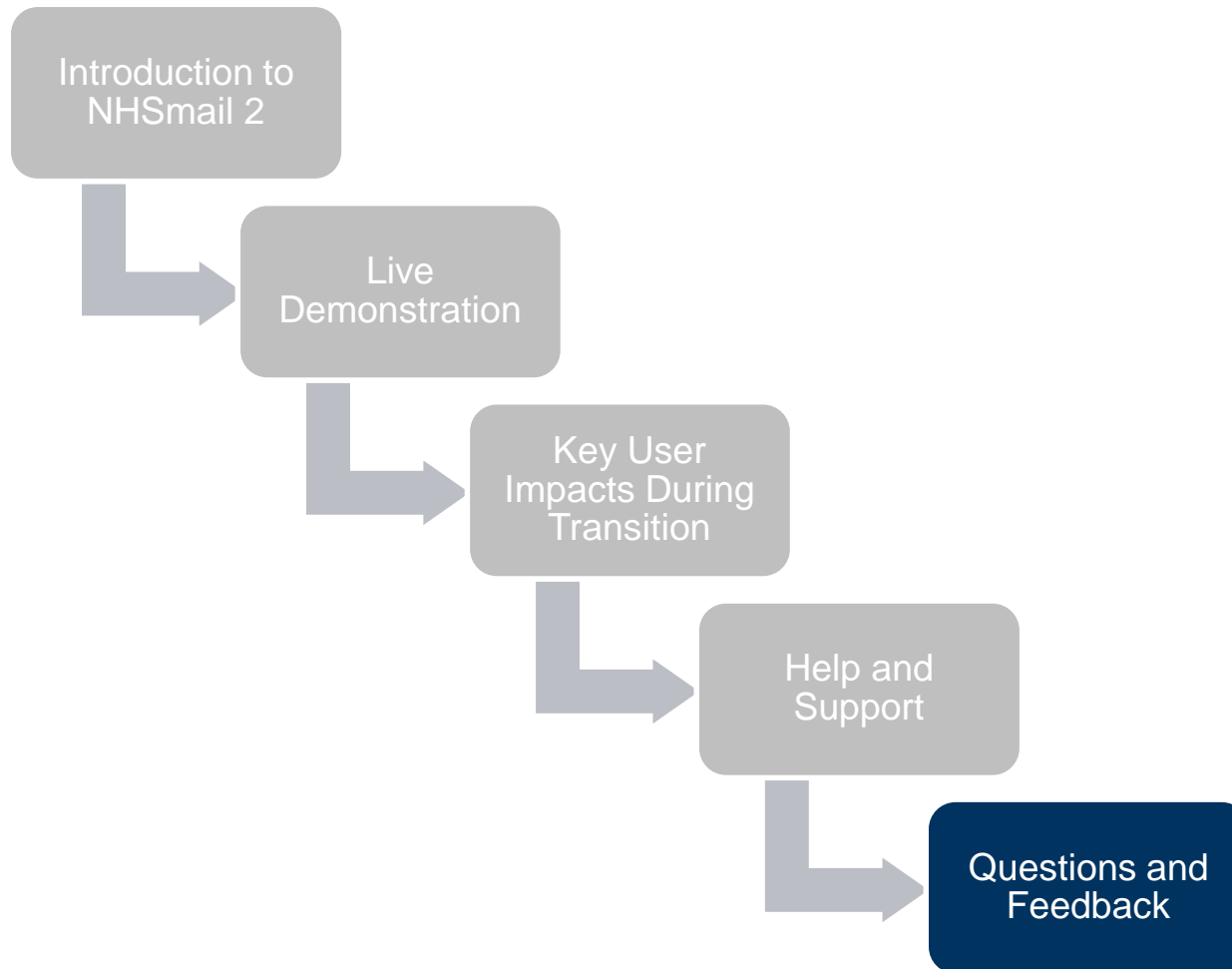
(Technical, policy and best practice advice)

Support:

Users should contact their LOAs and/or Training Managers for support.

In addition, support can be found by calling the NHSmail helpdesk on 0333 200 1133 or emailing helpdesk@nhs.net

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Next Steps

1. Ensure you know how to access the training materials via the transition pages and are aware of what materials are available.
2. Go through the NHSmail 2 training materials to ensure you are confident pre-transition.
3. Cascade any links and information to your organisation. This information should also be included in local organisation bulletins.
4. If you identify any gaps in training materials contact feedback@nhs.net.



Questions and Feedback



Any questions?

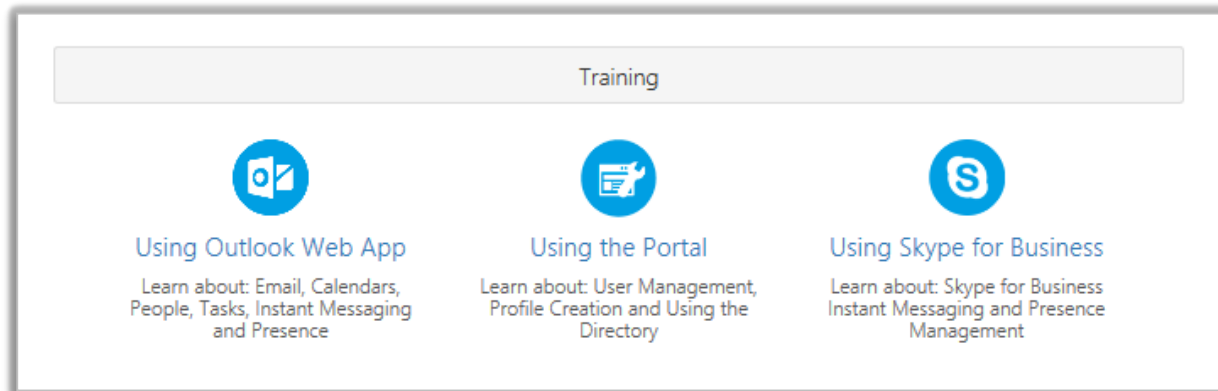
If you have any feedback following this session, please send it to feedback@nhs.net.

Appendix 1

Accessing the Outlook Web App training materials

The training materials can be accessed via the transition training pages at <http://support.nhs.net>.

1. Select Outlook Web App Learning Series
2. Scroll through the Learning Series landing page, locate the module you would like to view and click on the name of the module
3. On the module page you can watch the training video* and access the QRG by clicking on the link



* If you watch the videos in full screen you need to press esc or click close full screen after viewing

Appendix 2

Glossary

- **Outlook Web App** – the NHSmail email replacement service (web version)
- **Portal** – the new user and admin portal pages, where all training materials can be accessed
- **Quick Reference Guides** – step by step guides relating to specific functionality within OWA
- **Training Videos** – demos of the OWA functionality, reflecting the information in the QRGs
- **Local Organisation Administrator (LOA)** – prime contact responsible for the administrative duties relating to your NHSmail account (e.g. unlocking an account); A LOA may manage any Connectors the organisation may have in place
- **Instant Messaging** – sending a message via the internet that appears on the recipients screen as soon as it is transmitted
- **Presence** – enables users to let those using OWA Instant Messaging or Skype for Business desktop client when they are available to receive and respond to instant messages

Appendix 3

Useful information

What is the training solution?

The training solution is made of **3 Learning Series** (OWA, SfB, Portal), the **User Guide** (detailed guidance) and **Guidance** (technical information). The Learning Series are made up of a number of modules, relating to specific components of the solution.

For each module within the 3 Learning Series, you will find a **Training Video** and **QRG**. The training videos are an easy to follow guide and the QRGs can be easily printed.

How can you access training materials?

You can access the **training materials** via the [transition training pages](#).

Where can users find additional support?

Users should contact their **LOAs** or **Training Managers** for additional support. If further assistance is required, they can reach the NHSmail helpdesk on 0333 200 1133 or helpdesk@nhs.net

Key OWA User Impacts

Prior to account transitioning

- Helpdesk cutover impact and processes

After account has transitioned

- NHSmail Portal Transition State
- Shared mailboxes/folders
- Instant Messaging/Presence
- New Shared Calendars Experience
- No Notes
- Browser compliance

Post Portal Go-Live

- 4GB Mailbox
- Training and guidance available on the NHSmail 2 Portal (no login needed)