

Welcome to the webinar – NHSmail migration options

- The webinar will begin at 10.00am
- Please synchronise your web and phone presence by inputting your **Attendee ID** into the phone
- Participant lines will be muted during the presentation
- The webinar will be recorded
- You can use the chat messaging feature on the right of the screen to ask questions. Please only use this for questions, not general comments.

NHSmail migration options webinar

Tuesday 21 November 2017

Agenda

- Introduction – Henry de Ferrars (NHS Digital)
- Overview and objectives – Damian Dube (NHS Digital)
- Migration options – Simon Berest (NHS Digital)
- Self-migration option – Simon Berest (NHS Digital)
- Managed and supported migration options – Andrew Pearson (Accenture)
- Skype for Business (SfB) – Chris Hawes (Accenture)
- Next steps – Damian Dube (NHS Digital)
- Questions

Objectives of the webinar

- Providing information and support to organisations joining NHSmail
- Establish target dates of when your organisation plans to migrate to NHSmail
- Identify barriers organisations are facing in order to join the service
- Provide information on different migration options available
- Establish forward demand of required accounts to enable and plan for future demand

Migration options

There are a range of options available for organisations to migrate to the NHSmail platform

SELF MIGRATION



- For organisations with simple migration requirements & experienced technical teams
- Migrating organisation determines migration method & project scope
- Light touch migration support service & user guidance from NHS Digital
- Timescales driven by migrating organisation – can take 3- 6 months depending on complexity
- Assured against NHS Digital best practice migration checklist
- ‘Third Party’ migration - with support for project from a technology or service provider
- 17 Completed and 18 in the pipeline

[Self-migration guidance](#)



MANAGED MIGRATION

- For organisations with >2000 mailboxes
- Service provided by Accenture, NHSmail service provider
- Automated process driven by Quest tooling and Accenture delivery centre (24x7)
- Fixed scope – rapid migration, typically 12 weeks
- Co-existence maintained between source and target
- Project risk transferred
- Monitored against NHS Digital best practice migration checklist
- 22 organisations have migrated working with Accenture

Investment Required

NHSmail Top Up Services

Self-migration option

The key benefits of the self-migration options are...

FLEXIBILITY

- Organisation can determine migration scope & timetable
- Local resources, experience & expertise utilised
- Organisation can run project via it's own internal processes

COST

- Lower cost option – no 'external' investment required
- May not need any additional staff resources to run the project

GOVERNANCE

- Assured against NHS Digital best practice migration checklist
- Local IG team has overview of the project
- Local organisation owns the risks and issues of the project

Self-migration project documents

[NHSmail project initiation template](#)

[Self-migration project plan](#)

[Organisation self-migration guide](#)

Self-migration guidance

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

NHSmail self-migration – collateral

- [Organisation self-migration guide](#) – Outline and guidance for organisations to follow in order to be successful and achieve the migration.
- [Self-migration project plan](#) – Guidance document and template project plan for activities needed to self-migrate to NHSmail.
- [NHSmail project initiation template](#)
- [NHSmail migration comparison](#)

Self-migration overview

- Since July 2016, 30,000 accounts have self-migrated from 17 organisations.
- 18 organisations currently carrying out a self-migration with another 65,000 accounts in progress.
- Self-migration option has been used by small and large organisations (largest self-migration has been over 10,000 accounts)

NHSmail self-migration

- A Request for Change (RFC), which is required for all migration types, is submitted as part of the checklist process. This can take seven business days and should be factored into any plans.
- Top-up service agreement – This is the agreement to be signed between organisations and Accenture to enable the procurement of items from the top-up service catalogue.

Migration Governance

- Organisations will be required to have regular checkpoint calls with NHS Digital or Accenture to report/review progress against their migration.
- Migrations will be monitored to ensure the migration checklist process (which is based on best practice) is met and to ensure smooth progression.

NHSmail migration checklist – high level overview (1)

Stage 1 – Initial interest

- Organisation options appraisal
- Organisation to supply draft number of accounts
- Identify baseline benefits / review integrated applications
- Complete discovery questionnaire
- Executive approval to initiate project

Stage 2 – Initiation

- Assign project manager
- Approved PID
- Analyse / decide on migration method
- Analyse / decide on data migration method
- Local high level business plan written
- Local strategy board sign-off

Stage 3 – Running the project

- Confirm number of accounts needed on NHSmail - part of account reconciliation
- Communication strategy
- User / Local Admin training plan
- Establish local support policies
- Sign & submit top-up services agreement
- Server / PC Malware scans

NHSmail migration checklist – high level overview (2)

Stage 4 – Migration readiness

- Decide and implement bulk connector
- Technical pilot
- RFC is submitted
- Lessons learnt, risks & issues log updated if needed, resolve any technical issues ahead of mass migration
- Go / No-go decision from NHS Digital as part of request for change (RFC) process

Stage 5 – Roll-out

- Migration phase 1
- Migration phase 2 etc.
- Regular checkpoint calls with NHS Digital
- Monthly update to NHS Digital with account numbers registered per month, and numbers needed for next month

Stage 6 – Post migration

- In-house email server de-commissioning plan
- Benefits realisation plan (6-12 months after migration)

Any questions?

Managed and supported migration options

Accenture offers two managed migration options – automated bulk data migration to NHSmail with minimal end-user involvement

1. Supported Migration

Migration service providing planning support and tooling to enable migrating organisation's personnel to deliver the migration. Co-existence between source .nhs.uk and NHSmail environments maintained during migration.

2. Managed Migration

Comprehensive migration service providing planning support, tooling and technical expertise to deliver the migration. Co-existence between source.nhs.uk and NHSmail environments maintained during migration.
Accenture delivery network technical resources engaged 24x7 during agreed migration period.



Integrate Skype for Business deployment with managed migration – Instant Messaging, Audio & Video Conferencing and Conference Dial In.

- Technical pre-requisite, readiness and enabling tasks delivered by migrating organisation to enable the migration.
- Accenture are responsible for the delivery of the data migration aspects of the project.
- Managed migrations targeted at organisations >2000 mailboxes
- For follow -up Accenture migration services questions or queries nhsmail.central@accenture.com

The key benefits of the Accenture managed migration options are...

PACE

A proven seven step process enables:

- Managed Migrations to be typically completed in a 12 week period (start from the date that the local AD data quality is ready for synchronisation and Trust pre-reqs in place)
- The impact on local help desk and support teams to be minimised
- Any risk of data loss or IG incidents to be contained

SCOPE

Clearly defined scope:

- Accenture focussed on email data transfer
- Local email data is copied and not transferred
- Bulk new account provisioning
- Provides opportunity to update shared mailboxes, distribution lists and delegated permissions

BUSINESS AS USUAL

Quest migration tooling will:

- Provide co-existence during migration project
- Drive Managed and Partial migration approaches
- Provide 'one-touch' end user input during account switch over
- Mean no email black out or down time

**IMPLEMENTATION
WORKSHOP**

**DEDICATED PROJECT
READINESS SUPPORT**

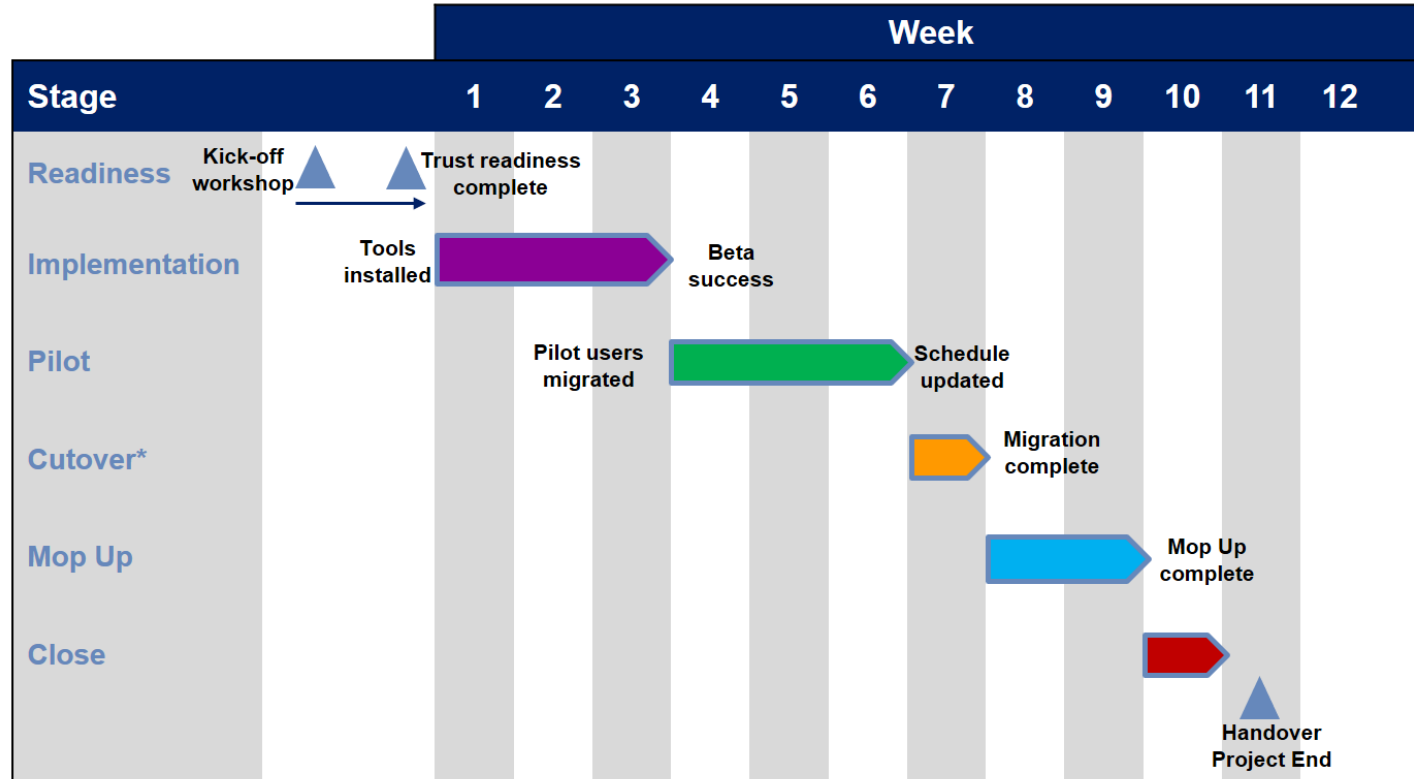
**MIGRATION GUIDE
BESPOKE QUEST TOOLING**

**** Procurement of migration services is via a NHSmail Top Up Services Agreement and Catalogue – both drafted and approved for migrating organisations by NHS Digital ****

Accenture managed migrations high level process

	Sign Up	Readiness	Implementation	Pilot	Sync/Cutover	Mop Up	Close
OBJECTIVES	<p>Confirm commitment of Org with sign up</p> <p>High Level Readiness Checklist to confirm all key elements (SRO, resources,, funding)</p>	<p>Ensure readiness prior to commitment of resources</p> <p>Avoid issues that stop/delay project due to lack of Org being ready</p> <p>Confirm plan and book into slot plan</p>	<p>Installation of Migration Tools (TANSync/ QMM)</p> <p>Confirm access and technology is working</p>	<p>Migrate initial set of users</p> <p>Prove it works and understand any issues to address ahead of main migration</p>	<p>Synchronise on premise accounts with NHSmail</p> <p>Schedule in agreement with Trust</p>	<p>Address outstanding issues or items 'parked' as more complex</p>	<p>Decommission tools</p> <p>Lessons Learned</p> <p>Final sign off</p>
OUTPUTS	<ol style="list-style-type: none"> 1. TSA 2. Raise first workshop PO 3. Tech Workshop booked 4. Pre-readiness checklist 	<ol style="list-style-type: none"> 1. Completed Pre-Reqs Checklist 2. Impl Plan 3. RFC 4. Schedule agreed 	<ol style="list-style-type: none"> 1. QMM Build complete 2. Beta complete 3. Sign off of distribution lists and shared mailbox 4. Accounts Provisioned 	<ol style="list-style-type: none"> 1. Pilot complete 2. Go/No Go Call 3. Confirm synchronisation run rate(ensure no technical issues impact sync plan) 	<ol style="list-style-type: none"> 1. All mailboxes migrated 	<ol style="list-style-type: none"> 1. MX RFC 2. Forwarders removed 	<ol style="list-style-type: none"> 1. Update LL 2. Service Sign off

Managed migration timeline (supported migration timelines will vary)



Migration readiness is essential to managed migration options – providing the foundation for a successful project

Discovery Questionnaire

Organisation Code
CEO / IT Director Telephone

Organisation Information
Transition Lead's Name
Transition Lead's Role
Transition Lead's Email
Transition Lead's Telephone/Mobile

No.	Area	Question	Answer	Customer Comments
R01	Business Readiness	Do you have a business case approved for your proposed migration to NHSmail 2?		
R02	Business Readiness	Do you have a project manager in place for your proposed migration to NHSmail 2?		
R03	Email	Number of mailboxes		
R04	Email	Of which are user mailboxes		
R05	Email	Of which are shared or resource mailboxes		
R06	Email	Of which are disabled/inactive		
R07	Email	Average Mailbox Size		
R08	Email	Number of Mailboxes over 4GB		
R09	Email	Details of mailbox Quota's in place		
R10	Email	Average number of messages sent/received (weekly)		

Server Specs Calculator

Adjust these values to calculate server CPU, RAM and SQL DB requirements. Organisations that do prior knowledge of GMM should not adjust values in C9 & D9

Mailboxes	Average number of messages per mailbox	Number of MAgE agents per host	Number of mail MAgE agents
1900	1500	10	200

Servers - On

	SQL	Console	Agent Hosts
Server required	1	1	2
CPU (cores per server)	4	1	6
RAM (GB per server)	8	4	12
SQL DB (GB)	2.854		

NHSMail Migration Pre-requisites v2.9

Pre-requisite task	Description
Project Resource	Organisation project manager in place for the duration of the migration
Technical Resource	Technical support available for the organisation for the duration of the migration
Helpdesk Resource	Organisation has sufficient helpdesk support for the duration of migration

Mailbox Data

File Format	Description
New users to migrate	Confirm receipt of standard CSV file formats Provide details of in-scope users who require the creation of an NHSmail account. CSV Rules: - File needs to be accurate before it is submitted and the organisation should be confident that it contains all their new user migration scope - Ensure the file is checked for duplicates prior to it being submitted Provide details of in-scope users who already have an NHSmail account. CSV Rules: - File needs to be accurate before it is submitted and the organisation should be confident that it contains all their existing user migration scope - Organisations should confirm with users that their existing NHSmail address is correctly matched to their local email in this CSV - There should be no users on this list that also exist on the new users list - Ensure that NHSmail address for the users are in scope for the migration and the relevant joiner/leaver process was followed ahead of the migration. If the mailbox is under different organisation on NHSmail portal it will not get migrated as the migration covers agreed ODS codes / organisation names.
Existing NHSmail users in scope for migration	

Data Sign Off

Sign the Data Accuracy Sign Off form to confirm the quality of the submitted CSV files and provide completed validation report with comments against all items

Introduction Migration Pre-Requisites

Migration Readiness Considerations

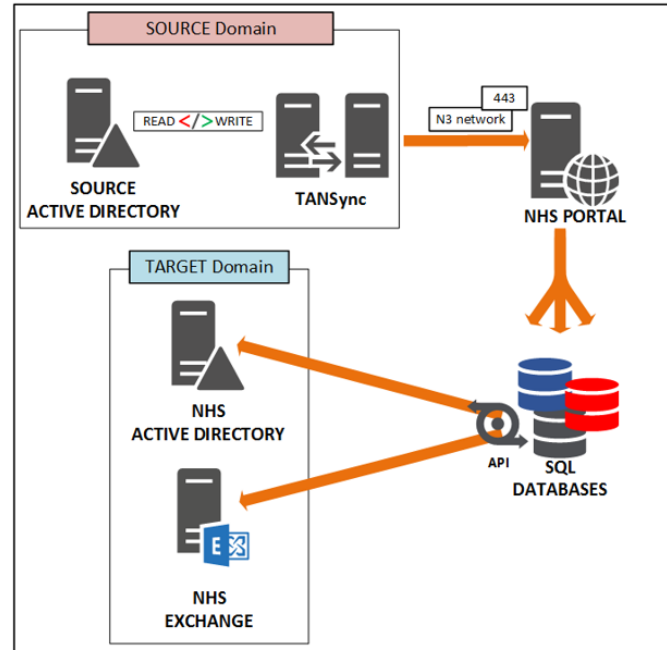
- Quest Tooling Infrastructure
- Project communication
- IG requirements
- Joiners & leavers process
- Approach to PSTs & Archiving
- Migration Data Quality & Sign Off
 - New users to migrate
 - NHSmail users in scope
- Mailbox size
- Mailbox item and attachment size
- Pilot users
- Skype for Business Users
- Shared mailboxes
- Distribution lists
- Migrating Public folders

Managed migrations – technical principles

Identity Management (TANSync)

NB. This can also be used for Self-migrations

- TANSync is an Identity Manager Solution which enables organisations to synchronise local people data with the NHSmail API. This solution has been created based on Microsoft Identity Manager (MIM) 2016.
- TANSync pushes information from the local Active Directory into the NHS Portal. The Portal then syncs the information into the NHSmail Exchange and Active Directory servers.
- Initial matching of the users which have an NHSmail account and on-premises one will be done through matching of source to target LEDN - > X500.



Identity synchronisation

Managed migrations – technical principles

Quest Migration Manager (QMM) 1/2

- **Quest Migration Manager (QMM) provides a minimum impact end user experience minimising the risk to business disruption for the organisation.**

- **The minimum QMM infrastructure resources to are:**

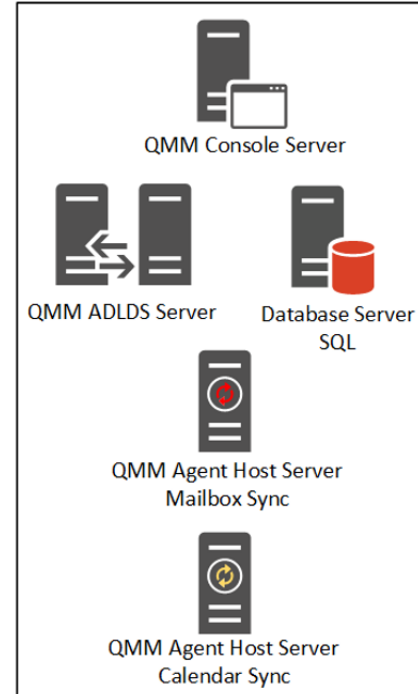
Console Server

AD LDS Server

Database Server

Two Agent Host Server to support mailbox and calendar synchronisation.

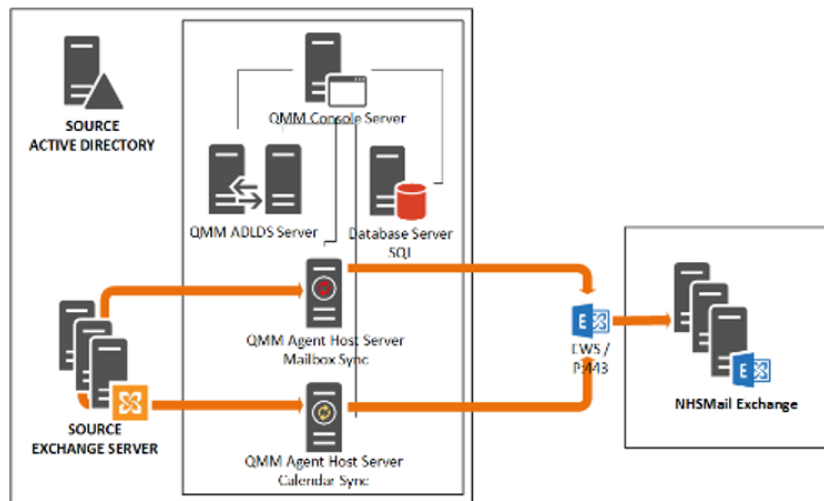
- **The resources need to sit in the same domain where the source AD and Exchange are and the server specifications depend on the number of mailboxes to be migrated.**



Managed migrations – technical principles

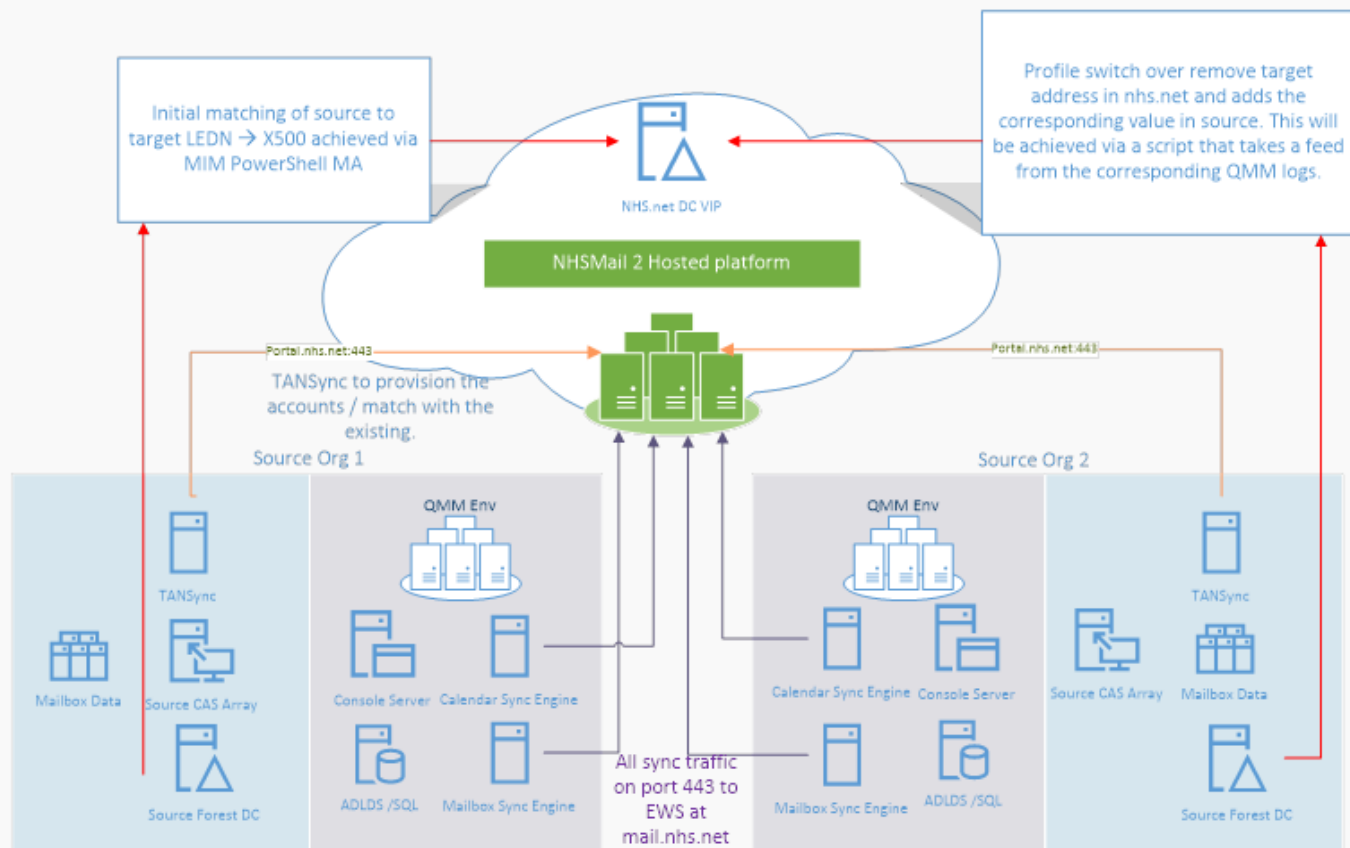
Quest Migration Manager (QMM) 2/2 co-existence

- **QMM will be used for mailbox and calendar synchronisation which will mirror the data on-premise creating coexistence between NHSmail and on premise mailboxes.**



Managed migrations – technical principles

Quest Migration Manager (QMM) multi-organisation migrations



Any questions?

Skype for Business

INSTANT MESSAGING & PRESENCE

The Instant Messaging and Presence features enable users to:

- Send Instant Messages to any user with access to NHSMail Skype for Business
- Set and view Presence based on availability to send/receive Instant Messages
- Automatically detect Presence based on Outlook Calendar
- Manage Contacts and Contact Groups
- Set and view location information

CORE SERVICE

NO CHARGE

AUDIO & VIDEO CONFERENCING

Audio and Video Conferencing features enable users to:

- Control access permissions and settings for Skype for Business Meetings
- Upload PowerPoint files to share on screen
- Share a Desktop or Window
- Manage a Question and Answer session
- Create and collect responses to Polls
- Collaboratively Whiteboard ideas and tasks
- 55p is currently funded centrally by NHS Digital but will be payable from April

TOP-UP SERVICE

£1.58 PUPM

CONFERENCING DIAL IN

The Dial-in Conferencing features enable users the ability to:

- Issue a Skype for Business Meeting invite with dial-in telephone numbers and a meeting ID
- Join Skype for Business Meetings via a dial-in telephone number

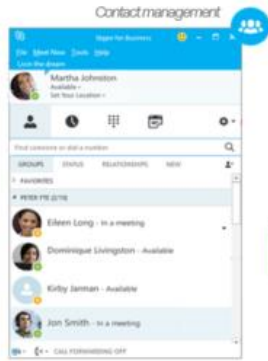
TOP-UP SERVICE

1.6p Per minute, per connection

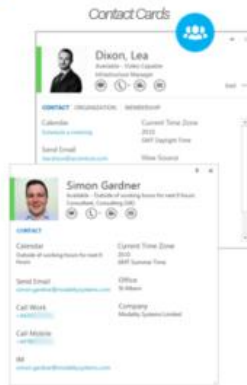
Costing is calculated on a per user per month costing model. Organisations are only charged for the number of accounts that are enabled at a given time. Dial-in conferencing charges are consumption basis per connection per minute. To start the procurement process, please contact nhsmail.development@Accenture.com.

SKYPE FOR BUSINESS | WHAT DOES IT LOOK LIKE

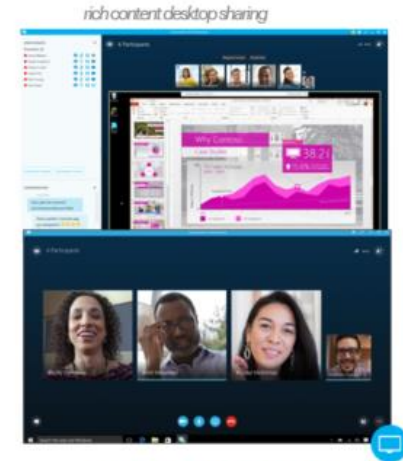
The NHSmail Skype for Business Service offers core (free to NHS organisations) and top-up (funded by NHS organisations) features. Below shows some of the features and how you can access them.



AT YOUR DESK



ON THE MOVE

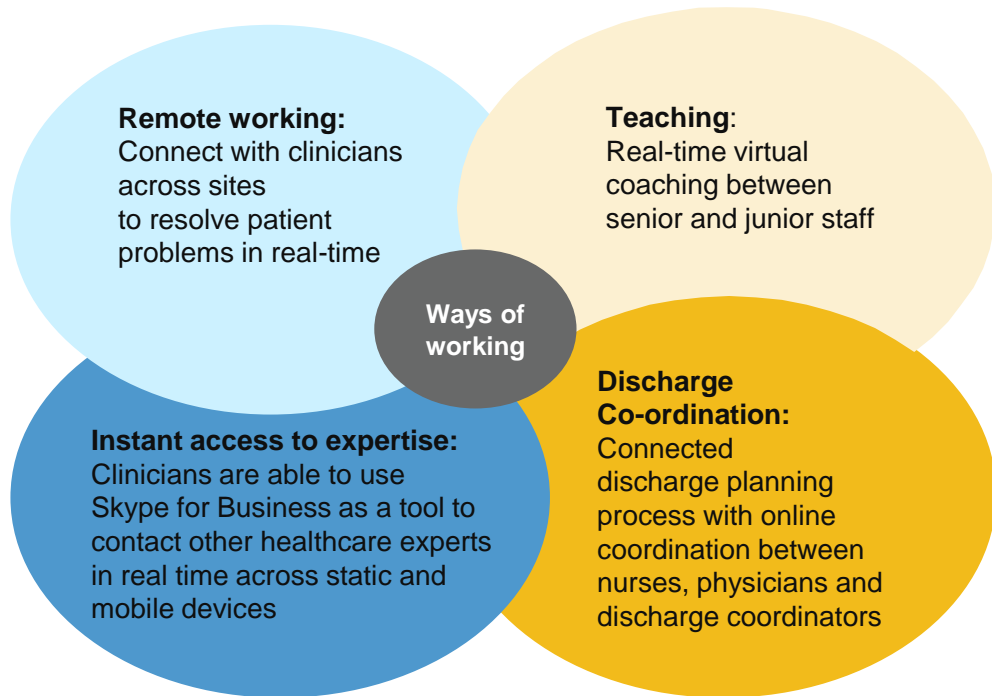
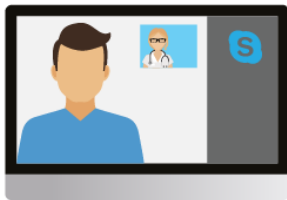


IN A CONFERENCE

The feature set can be built up depending on the requirements of your users; for example, a user could be provisioned with Instant Messaging and Presence only or with Instant Messaging and Presence plus Audio and Video Conferencing. A more detailed overview is available in the [NHSmail Skype for Business Service Description Document](#).

Ways of working with Skype for Business

During piloting, we identified several ways that clinicians can work with Skype for Business. This is not an exhaustive list but those detailed may inspire how your organisation can look to use Audio and Video Conferencing tools in the future.



Next steps

- NHS Digital will publish the slides and a recording of this webinar shortly on the NHSmail support pages at <http://support.nhs.net>
- Contact the NHS Digital self-migration project manager via feedback@nhs.net if you have queries not answered via the information provided within the NHSmail [Support pages](#)
- Contact Accenture via nhsmail.development@accenture.com if you would like further information on managed and supported migrations

Any questions?

www.digital.nhs.uk

 [@nhsdigital](https://twitter.com/nhsdigital)

enquiries@nhsdigital.nhs.uk

0300 303 5678