



Microsoft 365 Migration

G-Cloud 15 Service Definition

1. Jisc Strategic Cloud Adoption Services

Jisc can accelerate your strategic cloud adoption via a series of cloud professional services engagements, industry-leading public cloud infrastructure platforms and associated managed services.

Our Cloud Adoption Services cater for customers at various stages of cloud assessment, adoption and migration maturity; from the assistance of developing a business case and roadmaps, through to individual service design, migration and legacy off-boarding. We can assess your business, technical and service requirements, rationalise your infrastructure portfolio, develop your cloud strategy, roadmap, and end-state architecture, and manage your change program.

Each stage has a structured and well-defined engagement plan with associated inputs, tools, workflow and deliverables. Engagements are led by a dedicated and specialist cloud advisory services team that bring a diverse range of skills and experience across the commercial, technical and security domains.

Our Cloud Adoption Services can be procured as stand-alone engagements or as part of the following series:

- **Cloud Professional Services** Jisc's cloud Professional Services provide specialist technical consultancy to organisations using or planning to use cloud-based IT service delivery models. Jisc has a broad range of practical experience in relation to managing many aspects of cloud service design, migration and operation. We draw on this experience to offer organisations skilled, flexible and pragmatic resources to meet short-term business challenges and/or to contribute to, or lead, longer-term projects or cloud-centred IT transformation programmes.
- **Cloud Architectural Services** – The Jisc Cloud Architectural Service will support you in designing services to run effectively on public cloud infrastructure. These may be redesigns of existing (legacy) services that currently run on physical or virtualised infrastructure, or new services that will be developed specifically for AWS (Amazon Web Services) or Azure. It may also be determined that a hybrid (cloud and on-premises) or multi-cloud solution is the most appropriate approach. For projects that already include cloud architecture, the service pragmatically reviews and assess your current public cloud estate and associated operational processes against your business objectives from the perspectives of operations, security, reliability, performance, and cost optimisation. It then makes architectural and operational recommendations with respect to cost-benefit, best practices, processes, implementation approaches and timescales.

- **Cloud Migration** – to support the migration of services from legacy providers and/or on-premises infrastructure to Microsoft Azure or AWS.
- **Microsoft 365 Migration** – (this one – see summary section below)

We can also assist you, if necessary, in gaining the government accreditation required to operate a service in accordance with its associated information assurance requirements or to meet a compliance regime, e.g., PSN.

Jisc has worked extensively with several leading UK government third sector and education organisations to assess, design, plan and implement significant cloud-centric, IT transformation projects. These have supported business change, cost reductions, improved productivity and new channels for focused service delivery or revenue generation.

2. Summary

Office 365 provides a comprehensive suite of online productivity and collaboration tools hosted by Microsoft, including MS Office, email and calendar, online meetings, file sharing and video management.

Jisc has significant experience managing the migration of customer IT services and workloads from existing hosting arrangements to cloud services.

Our Microsoft 365 Migration Service can assist you with the planning and adoption of Office 365, including migration and on-boarding, connectivity, Active Directory integration, customisation and information assurance, allowing you to focus on your business priorities. Following a migration, this service can be augmented by our Microsoft 365 Support service which has been designed for organisations who wish to take advantage of the benefits offered by Microsoft 365 without the need to directly manage the environment themselves.

3. Service Overview

Migrating services from on premise systems, or an existing Office 365 cloud to the Office 365 cloud can be grouped into three primary sets of services.

3.1 Identity Management

Creating your user accounts in the underlying Entra ID (Formerly Azure Active Directory) so that they can have licenses assigned and get access to the Office cloud services. There are three ways this can be achieved and Jisc consultants can assist with deciding which solution is best for your requirements.

3.1.1. Native Cloud Users

User objects are created as new in Entra ID. There will be no connection between user accounts on premise and those in the cloud.

3.1.2 Synchronised User Accounts

User objects are synchronised from the on-premises Active Directory (AD) to Entra ID using the Microsoft Entra Connect service. For many organisations, an on-premises AD is still required for other line of business systems, so this is a common choice. For organisations planning to move other infrastructure and services into a public cloud, such as Azure, the on-premises AD source can even be run on virtual machines (VMs) in that cloud infrastructure.

The synchronisation service can maintain secure password hash synchronisation to allow users to manage their passwords on premise. This can be further extended to allow seamless Single Sign On (SSO) so that users that are synchronised can log into their computer and seamlessly get access to Microsoft cloud services without having to log on again.

3.1.3 Federated User Accounts

Microsoft Active Directory Federation Services (ADFS) can be used to configure Office services to forward identity authentication requests to on premise (or public cloud based) federation servers.

3.2 Mailbox Migration

Often the first phase of any Office 365 migration is to move mailboxes from an on-premises Exchange infrastructure, or an existing Office 365 cloud into the Exchange Online component of Office 365. Depending on the current mail platform, the version of Exchange if that is the system, and the size of the organisation there are a number of approaches that can be taken to move your mailboxes to the cloud. Whatever your organisation's requirements, Jisc consultants can assist and advise in the decision making as to which approach is best. Once an option is selected, we can then assist with the implementation.

3.2.1 Cutover Migration

For small organisations (typically fewer than 250 users) it can sometimes be simplest to switch over mail flow in one go. The process involves setting up a mailbox synchronisation service between Exchange online and the source Exchange system. Once the two systems are in sync then the mail flow can be rerouted to the destination cloud before decommissioning the source Exchange infrastructure.

3.2.2 Hybrid Migration

For many organisations the user base is simply too great for a cutover, or they are planning to manage user accounts on premise so require access to the mail attributes added by an Exchange installation. In this case a Hybrid migration is generally the best approach.

In this option, the on-premises Exchange environment is joined to the online Exchange environment so that both platforms run together as a single entity. Mailboxes can be moved between the two halves in either direction and moved in batches as and when the organisation is ready. User accounts must be managed on premise, so an Entra Connect system is required as part of this solution.

3.3 Document Migration

Whether your organisation uses SharePoint on premise or not, SharePoint Online will almost certainly be a key part of your initial Office 365 migration. The SharePoint platform underpins

many of the Office 365 services such as Teams and OneDrive. Whilst there are various native tools to assist with the migration of data and the adoption of SharePoint, there are also many third-party options that can ease the move of large and complex data sources such as existing on-premises SharePoint infrastructure. Jisc consultants can advise on the suitability of these for your project.

Common scenarios that occur during Office 365 adoption include:

3.3.1 Home Drives to OneDrive

Many organisations use mapped home drives or file shares for users' individual document storage. These can be migrated to OneDrive, which is a user-specific private SharePoint location.

3.3.2 File Shares to SharePoint Document Libraries

As well as personal home drives, most organisations use file shares, possibly through mapped drives, to store common and share documents. These can be migrated to SharePoint document libraries.

There are many considerations when it comes to designing and building SharePoint online site infrastructure and document storage. Jisc can help you to define appropriate requirements and implement them with you or for you in your Office tenant.

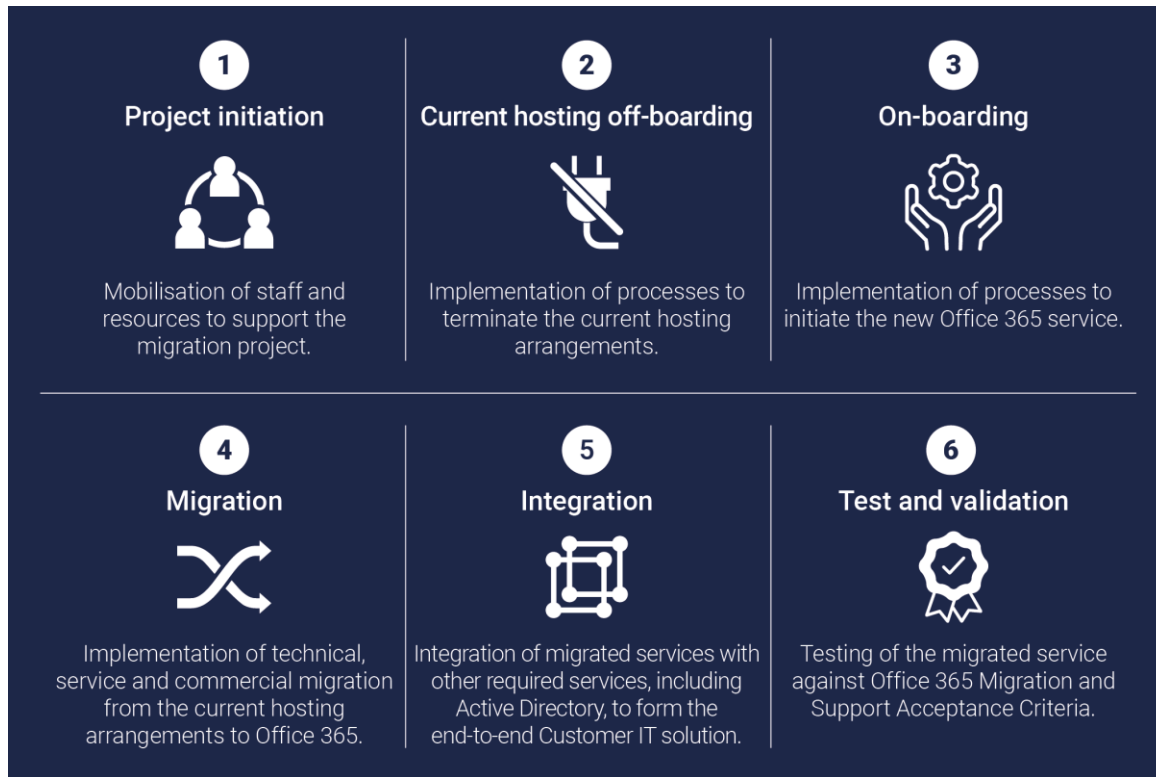
3.3.3 SharePoint Document Libraries to SharePoint Document Libraries

Many organisations already make use of SharePoint document libraries within Office 365. When planning to migrate this data to other SharePoint document libraries there can be many considerations, Jisc can assist to ensure that all the requirements are considered, and to assist in implementing a migration strategy for this data.

3.3.4 Microsoft Teams to Microsoft Teams

Migrating from one Microsoft Teams environment to another involves transferring standard template teams and their channels, permissions, files etc to a new tenant. This process is essential during organizational changes such as mergers or acquisitions. Jisc can assist in planning and migration of this data to ensure continuity of operations.

4. The Service



4.1 Migration Setup

Migration setup includes discovery and project planning phases which ensure that all relevant requirements and knowledge are gathered, and a baselined migration plan is mutually agreed. This plan forms the basis for the subsequent controlled implementation of the migration to Office 365.

4.1.1 Migration Discovery Phase

The migration discovery phase is the initial project phase, gathering customer business requirements, stakeholder information and timescales and documenting and assessing current hosting arrangements and Office 365 technical, service, and commercial information.

4.1.2 Migration Project Planning Phase

Following completion of the migration discovery phase and an analysis of all the associated records and questionnaires, a detailed migration plan will be produced which will form the basis for the structured and controlled delivery of the migration project. The plan will be produced by an experienced Jisc Project Manager familiar with the process of handover to ITIL service operation.

4.1.3 Technical On-boarding Requirements

It is expected that the customer has defined and documented the to-be solution architecture for the project. This documentation will comprise an overview of the functional and non-functional requirements including, but not limited to:

- An overview of business requirements, including use cases and activity flows where necessary.
- Integration requirements and architecture, if required, including AD.
- Security requirements.

4.2 Migration Implementation

Following completion of the migration discovery and project planning phases, the migration implementation project can start. This involves project managing the implementation and control of the migration plan, including managing defined phases, underpinning stages and boundaries and controlling risks.

4.2.1 Migration Project Initiation Phase

The project initiation phase mobilises the budget, people, resources, and project organisation to begin the migration implementation project in line with the agreed migration plan. This includes interfacing to customer project and quality systems, setting up project control mechanisms, project files and collaboration environments.

4.2.2 Current Hosting Off-boarding Phase

The current hosting off-boarding phase covers the technical, service, and commercial aspects of terminating the current hosting service, including in-house hosting arrangements, to ensure all customer data, software and operational documentation is removed and made available to the Office 365 migration service. It includes:

- Service termination: liaising with the current hosting provider and relevant third parties to terminate the current hosting contract, service, and support arrangements. This will include examination of any possible software license novation or reuse.
- Technical off-boarding: network, storage, software, application decommissioning, assessment of data extraction and cleansing requirements.

4.2.3 On-boarding Phase

The on-boarding phase covers the technical, service, and commercial actions required to initiate the Office 365 tenant and to establish the technical infrastructure, tools and configurations required to support technical migration. It includes:

- Service initiation: liaising with your chosen procurement partner for the Office 365 contract, commercial, service and support arrangements.
- Technical infrastructure setup: provisioning the required network and secure access, provisioning backup and disaster recovery solutions as appropriate and establishing service integration system access.

4.2.4 Migration Phase

Once the core technical infrastructure is setup the implementation of technical and service migration from the current hosting arrangements to Office 365 can start, in line with the migration plan. This activity will use an experienced Jisc Project Manager following a structured approach to project and risk control.

Key elements of the migration phase include:

- Office 365 configuration, in line with specific technical solution (data, application and security) requirements.
- Technical migration: Implementation of the technical migration in line with customer design authority recommendations and using Jisc template approaches as appropriate.

- Service Migration: Implementation of the service migration in line with customer design authority recommendations and using Jisc template approaches as appropriate.

4.2.5 Integration Phase

Following migration of the core technical services to Office 365 a system and service integration phase may be required in relation to other systems to establish the full end-to-end customer solution. This may include integration with other cloud and non-cloud software and application services and providers.

If the migration does not include transformation to a radically different solution, it is likely that many of these service integration requirements and relationships will already be well understood and will have been captured in the discovery phase.

4.2.6 Test and Validation Phase

Following completion of all aspects of the technical migration, test and validation will start. This will typically be conducted by customer technical, operations and business representatives and will include:

- Backup and recovery testing; disaster recovery testing as appropriate.
- User Acceptance Testing against Office 365 Migration acceptance criteria.

Any itemised test failures will be analysed, corrective actions put in place and test scripts will be repeated until the tests are passed. An Office 365 test and validation report detailing performance against specified Office 365 Migration acceptance criteria will be produced as an output from this phase.

4.2.7 Project Closure

Following the successful completion of the Office 365 Migration project, a post-implementation review will be held. The output will be a concise post-implementation review report outlining how well the project performed against the migration plan including the original planned cost, schedule, and acceptance criteria. The project will then be closed, and the Office 365 Migration service will be complete.

4.3 Hours of Service

The Office 365 Migration service is provided during core hours of service, which are Monday to Friday 8am to 6pm, excluding English Public Holidays.

4.4 Project Control

The Office 365 Migration Service can be regarded as several distinct projects each divided into stages, with acceptance criteria acting as boundary gates which must be satisfied before progressing. Each stage will be defined in terms of work packages specifying the activity, subtasks, owner, authoriser, milestones, and acceptance criteria.

Project control is maintained by the regular review and reporting of work package progress against milestones, capturing issues, taking mediating actions and escalating as required. The Jisc Project Manager will, as required, update the migration plan under a change control process and a risk log will be maintained.

Work packages will be closed on completion and according to acceptance criteria compliance as appropriate. The final work package(s) form the boundary to the next migration project stage and will typically require customer sign-off before progressing.

The Jisc Project Manager will provide regular communication of project progress and risks via a weekly project progress report and by other agreed communication mechanisms such as face-to-face progress meetings, conference calls, project board meetings and risk and issue reviews.

4.6 Project Reporting

The service will deliver a weekly project progress report highlighting:

- Progress against the migration plan.
- Current issues, risks and mitigation actions.
- Current spend against budget.

4.7 Risk Management

The Jisc Project Manager will hold and maintain a risk log which prioritises project risks and identifies mitigating actions, owners and timescales. Risks will be regularly reviewed, reported and escalated to the customer following an agreed process.

4.8 Change Management

Major business, technical or service change affecting the baseline migration plan will typically be reviewed by a change project board which includes the Jisc Project Manager. The change project board will agree the change scope, planning, implementation and cost impact.

Significant customer changes impacting the Office 365 service will follow an agreed request for change process. Changes will be logged and referenced as part of a project configuration control approach which maintains service integrity and control.

4.9 Service Deliverables

The Office 365 Migration service will produce the following deliverables as key milestones within the project lifecycle:

4.9.1 Migration Setup

- Discovery report: a concise business-focused report outlining the customer business requirements, migration budget, IT solution/service overview, stakeholder information; priorities, timescales and risks; and acceptance criteria.
- Project brief: A high-level roadmap plan for the service migration, incorporating all the high-level phases.
- Migration plan: the baselined and costed detailed migration plan which is subject to customer agreement and sign-off prior to project initiation.

4.9.2 Migration Implementation

- Project progress report: a weekly report covering progress, issues, risks and mitigation actions.

- Test and validation report: a report on the compliance of the migrated Office 365 solution against acceptance criteria.
- Post-Implementation review report: a concise report highlighting how the project performed against its planned cost, schedule and acceptance criteria.

4.10 Service Levels

4.10.1 Deliverable Milestones

Project Deliverable	Deliverable Due Date
Discovery Report	Two working weeks after the completion of the Discovery Phase
Project Brief	Two working weeks after the completion of the Discovery Phase
Migration Plan	Baselined plan produced one working week after the completion of the Project Planning Phase
Project Progress Report	Weekly, delivered by end of each working week, beginning at the end of the Project Initiation Phase
Test and Validation Report	One working week after completion of Test and Validation Phase
Post-Implementation Review Report	Two working weeks after completion of Commissioning Phase

4.11 Service Pricing and Invoicing

The setup phase will be priced via Jisc consultancy on the basis of the size and the scope of the migration requirement. The output of the setup will include a baselined migration plan incorporating a proposal for the subsequent migration implementation project. The customer may decline this proposal in which case the Office 365 Migration service will terminate or accept it in which case the implementation project will proceed.

4.12 Training and Trial Service

The Microsoft 365 Migration service does not provide any customer training or trials.

4.13 Service Credits

The Microsoft 365 Migration service does not issue service credits.

4.14 Service Termination and Off-boarding

Customers may terminate the Office 365 Migration service in line with the relevant Jisc terms and conditions.

On completion of the Office 365 Migration service, Jisc will:

- Provide the customer with copies of all project deliverables and reports.

- Cease its access to any project or collaboration tools or workspaces.
- Delete and cleanse any customer-related data or information held by Jisc or on Jisc infrastructure to required security standards.

4.15 Service Constraints

The Office 365 Migration service has the following limitations and exclusions:

- The scope of the migration implementation project will be baselined and agreed in the migration plan prior to project initiation. Any subsequent significant change in requirements will be subject to a request for change, which will be assessed by Jisc and may incur further cost.
- The service excludes visits to customer sites, including the attendance of project reviews. Attendance will be subject to prior agreement with any expenses incurred charged additionally.

4.16 Customer Responsibilities

The customer has the following responsibilities in relation to the service:

- The customer will provide Jisc with access to – and participation of customer business and technical stakeholders for Jisc to conduct the discovery work in accordance with mutually agreed timelines.
- The customer will provide Jisc with contacts and technical information in relation to the current hosting arrangements and service integration partners for Jisc to conduct the discovery phase.
- The customer will authorise a baseline cloud service migration plan and a Jisc cloud service migration implementation project proposal prior to project initiation.
- The customer will agree acceptance criteria with Jisc in relation to all key project stages and test and validation.
- The customer will provide on-going input to the Jisc Project Manager in relation to changes and risks.