

# **Global AD User Migration Instructions**

Version: 1.5

Date: 2<sup>nd</sup> July 2025

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## **Pre-Migration Steps**

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**IMPORTANT:** The first time you log in after the migration, you <u>must not</u> be in a National Grid office. Use your **home Wi-Fi** for the login process.

### To be completed BEFORE you log off the evening of migration

- Ensure your device has been upgraded to Windows 11 and all deployed updates and software installations have been successfully installed.
   To check all Windows Updates are downloaded and installed, go to Windows Updates in Settings and click Check for Updates and wait until it says You're up to date
   Windows Update
   You're up to date
- Check that you have a Windows Hello for Business (WHfB) **PIN** configured and you know what it is.

Your WHfB PIN should be at least 6 numbers long, if you've forgotten your PIN and need to reset it, go to **Settings** and you can find the link to reset it here:

Acc	ounts > Sign-in options		
•	Some of these settings are managed by your organization.		
Ways to	o sign in		
÷	Facial recognition (Windows Hello) Sign in with your camera (Recommended)		~
<u>ش</u>	Fingerprint recognition (Windows Hello) This option is currently unavailable		~
ų	PIN (Windows Hello) Sign in with a PIN (Recommended)		^
	Change your PIN	Change PIN	]
	Remove this sign-in option	Remove	]
Rela	ted links I forgot my PIN		

• On the day of migration at the cutoff time allocated, shut down your device.

Please ensure your device is fully **shutdown** and not in sleep/hibernation mode at **6pm** local time on the day of migration; failing to do this could result in delays in authentication the following day.

You should not use your corporate applications on your mobile devices after 6pm, but can continue to use the browser and non-corporate applications on them.

# **Post-Migration Steps**

### To be completed the first morning AFTER migration

#### 1. Your First logon

1.1. Log on to your device with your email address and your existing password.

For example: joe.bloggs@nationalgrid.com



You MUST use your email address.

**DO NOT** use your old logon details of @uk.nationalgrid.com or @us.nationalgrid.com or your old Shortname such as Joe.Bloggs.

#### 2. Zscaler check

2.1. Open the Zscaler Client



2.2. Check that the **Zscaler Private Access** and **Internet Security** components are both authenticated with your email address. If they do not show your email address, or show an error, click the **More** button, then click **Update Policy**, as per the following images.

Zscaler Client Conv	nector	– 🗆 X	Zscaler Client Con	nector	– 🗆 X	Zscaler Client Con	nector	– 🗆 ×
<b>E</b> zso	caler	@nationalgrid.com	<b>E</b> zs	caler	Log Out	<b>E</b> zs	caler	Log Out
Private Access Private Access Internet Security Notifications More	Connectivity Usenare Service Stans Network Pype Authentication Status Date Clear Protocol Statistics Total Packets Received	Chromodynckom     Chromodynckom     Chromodynckom     Chromodynckom     Chromodynckom     Chromodynckom     Chromodynckom     Chromodynckom     Chromodynck     Chromodynch     Chromodynck     Chromodynck     Chromody	Prinzte Access Prinzte Access Internet Security Notifications Notifications More	Connectivity Usename Servic Status Server Celect Time Coxected Time Coxected Total lyses Sect Total lyses Sect Total lyses Sect	@vulninkgrid.com           CR         ①           CPS Turbit Off         0.000 CPF           CPS Turbit Off         0.000 CPF           1/27.30.306.305.403         17.27.30.403           1/27.20.401.504         19.200 CPF           0/2.000.505         7.000           0/2.000.505         7.000           46.31.MB         17.23.MB	Private Access Private Access Internet Security Notifications Notifications More	Settings     Settings     Sover all conflictions     Sover insufferences     Sover     Sover insufferences     Sover insufferences	Update Policy

You may receive various error messages from Zscaler including "Blocked by policy"; these messages will stop once Zscaler has authenticated.

#### 3. Windows Hello for Business (WHfB) update

Follow the steps below to link your existing WHfB **PIN** stored on the device to your new logon details.

- 3.1. Ensure you are logged into Windows with your email address and password.
- 3.2. While logged in, lock your device (**CTRL+ALT+DEL** > **Lock**), then unlock, but choose to use the **PIN** method and enter your **PIN**.



It is critical you perform the above steps while logged onto Windows with your email and password and use the PIN to unlock, for this to work correctly.

You may need to block your camera if you usually log on with facial biometrics to facilitate a PIN unlock.

#### 4. Password change

After being migrated to Global Active Directory you will need to change your password. This is due to there being a new password criteria, and to make sure passwords are up to the latest encryption standards.



You should change your password even if you currently have a strong password.

Your computer will not prompt you to change your password so you must do it manually.

At National grid we enforce a complex password, which requires a minimum of 15 characters and characters from three of the following categories:

- Uppercase letter
- Lowercase letter
- A number
- A special character

A special character would be one of the following: '-!"#\$%&()\*,./:;?@[]^\_` {|}~+<=>

They must not use elements of your name, repeating patterns, or obvious character sequences (such as abc, 321, qwerty, 13579).

To change your password follow these steps:

- 4.1. Change your password using the standard Windows method: CTRL+ALT+DEL > Change a password
- 4.2. A web browser will open which may prompt for authentication, you will then be presented with the following screen to change your password:

Change your password		>
User ID John.Smith@nationalgrid.com		
Current password		
Forgot your password? New password		
Confirm new password		
	Cancel	Submit

4.3. After entering your old and new password you should click submit, you should receive a confirmation window that your password change was successful, as shown.



4.4. You should **wait a few minutes** and then **log off** and **back onto your device** with your **new password**.



Passwords should be at least 15 characters long, use a mix of upper and lowercase letters, numbers, and symbols. They must also not use elements of your name, repeating patterns, or obvious character sequences (such as abc, 321, qwerty, 13579).

You **must** change your password even if you currently have a strong password. This is to ensure the latest security standards are applied to your password.

#### 5. Microsoft OneDrive

5.1. Check your OneDrive is connected, and you can see all your files.

<ul> <li>Elon Musk - National Grid</li> </ul>	×	+					- 0	×
€ → ↑ °	<ul> <li>One</li> </ul>	Drive 🔿 John Doe – National Gri	id >			Search Danyal - Na	ational Grid	٩
⊙ New - 👗 📀		🗐 😢 🗊 14 Sort -	≡ View - ···					Details
A Home		Name	Status	Date modified	Type	Size		
Callery	_	_Backup	0	21/02/2024 03:04	File folder			
Elso Musk - National Grid		Data _Data	٥	21/02/2024 03:04	File folder			
		Attachments	0	21/02/2024 03:04	File folder			
Decktore		Changes	۵	09/03/2024 21:46	File folder			
Desktop	1	Designs	0	21/02/2024 03:04	File folder			
Downloads	1	🚞 Аррз	0	21/02/2024 03:04	File folder			
Documents	- 1		0	21/02/2024 03:04	Filefolder			
Pictures	1		0	21/02/2024 03:04	File folder			
Music			0	21/02/2024 03:04	File folder			
42 items								



Other users with links to files you have previously shared with them may need you to send them new links due to your logon change, which results in your previous shared link URLs becoming invalid.

5.2. You can see all your shared files and files shared with you, by clicking the **OneDrive** icon on the **Windows Taskbar** and selecting the **View online** option.



If your OneDrive is not syncing, then you can sign out and back into OneDrive to attempt to get it to start syncing. Follow the steps below:

5.1. Click on OneDrive in the settings tray in the bottom right and then click on Settings



5.2. This will open the OneDrive settings panel, click on the Account tab

<ul> <li>OneDrive Settings</li> </ul>			×
C Sync and backup	Sync and backup		
S Account	Back up important PC folders to OneDrive		
↓ Notifications	Back up your Desktop, Documents, and Pictures folders to OneDrive, so they're protected and available on other devices.	Manage backup	
(i) About	Learn more		
	Preferences		
	Start OneDrive when I sign in to Windows	On 💽	
	Pause syncing when this device is in battery saver mode	Off	
Storage	Pause syncing when this device is on a metered network	On 🚺	
2.0 GB used of 1 TB (0%) Manage storage	Advanced settings 👻		
Get the OneDrive mobile app	① Get help		

5.3. In the Account tab, click Unlink this PC

<ul> <li>OneDrive Settings</li> </ul>		- • ×
$\widehat{\mathcal{C}}$ Sync and backup	Account	
	John Doe	
<ul><li>Notifications</li><li>About</li></ul>	S Unlink this PC	+ Add an account
	OneDrive - National Grid 91 MB used on this PC	Choose folders
	<ul> <li>Get help</li> <li>g<sup>o</sup> Give feedback</li> </ul>	
Storage 2.0 GB used of 1 TB (0%) Manage storage Get the OneDrive mobile app		

5.4. You will then receive a warning that your device will stop syncing, just click Unlink Account

Unlink account on this PC	Z?
Your business content associated wit (John.Doe@nationalgrid.com) files will remain on this device while o	h account will stop syncing. Locally available online only files will be removed.
Unlink account	Cancel

5.5. Once signed out, it should automatically pop up for you to sign back into OneDrive, with your email address automatically filled, just click **Sign in** 



5.6. It will then ask you where you would like your OneDrive folder, there is no need to change this, so click **Next** 



5.7. You will get a popup that a OneDrive folder already exists there, as you are connecting with the same account, click **Use this Folder** 



5.8. You will then get a screen on backed up folders, once they have been checked you can then click Next

Microsoft	OneDrive				×
Back Files will even if y Learn m	up folders o be backed up, pr ou lose this device ore about folder	on this PC rotected, and ava ce. backup	ilable anywhe	ere in OneDrive - N	lational Grid,
	Documents	39 MB	Backed up		
	Pictures	63 MB	Backed up		
	Desktop	1.6 GB	Backed up		
<b>1</b> 2.0	0 GB used of 1 TE	3			
	Next			Start backup	

- 5.9. You will then get some screens running how to use OneDrive, you can go through them and click Next when you are ready
- 5.10. You will then get to the OneDrive mobile app screen, you can set this up at a later date, so click Later



5.11. You are then done setting OneDrive up again, so just click Open my OneDrive folder



#### 6. Microsoft Outlook

6.1. Check that Microsoft Outlook opens and correctly displays your mailbox.

#### 7. Microsoft Teams

- 7.1. Check that Microsoft Teams opens correctly and that you can see all your previous conversations.
- 7.2. You may need to log out and back into Teams if you're having issues.



#### 8. Microsoft Edge

- 8.1. You should sign out and back into Edge to ensure your new username is showing.
- 8.2. Open Edge and click the three dots in the top right of the browser, then select settings.



#### 8.3. Click the **trash can.**

Work         @nationalgrid.com         Image: Sync is on	1
Your organisation has turned on sync for this device.	
O Manage account	Z

8.4. Click **Remove profile**, you will not lose your browsing data as this is backed up to Office 365 and will be restored when you sign back in.

Remove this profile?				
This will permanently delete browsing data like favourites, history and passwords from this device. However, any data that was previously synced to your profile will remain associated with your Microsoft account.				
Remove profile	Cancel			

8.5. Then click the **X** to close the window that pops up.

Microsoft Edge			- ×
	Your admin needs you to sign in. To use Profile 1, please sign in	or switch to a different account.	
Your profil	e	+ Add profile	
	Profile 1	Sign in	

8.6. Reopen Edge from a shortcut you have then click **sign in** and continue the process to sign into Edge. The profile number you sign into may be different, e.g. Profile 2.

Microsoft Edge	- ×
Your admin needs you to sign in. To use Profile 1, please sign in or switch	ch to a different account.
Your profile	+ Add profile
Profile 1	Sign in

#### 9. Microsoft OneNote

OneNote needs to be pointed to the new OneDrive location of your notebooks.



These instructions assume you store all your personal notebooks on OneDrive. Notebooks stored on SharePoint team sites, or notebooks shared with you by other users, should not need relinking.

If you use OneNote, it is crucial that you perform these steps **after migration** and **before** you edit your notebooks, otherwise your changes will not be synchronised and backed up to OneDrive.

#### **Close your personal notebooks**

- 9.1. Open OneNote, click File > Info.
- 9.2. Make a note of the names and locations of all your open notebooks. It may be worth taking a screenshot (**Start** + **Shift** + **S**, then left-click and hold to drag a rectangle over the area to capture).



9.3. Close all your personal notebooks (those with paths starting <u>https://nationalgridplc-my.sharepoint.com/personal</u>, except those notebooks shared with you by other users). Left-click on the Settings button next to each notebook and click Close. Further guidance on closing notebooks can be found <u>here</u>.



#### Reopen your personal notebooks from OneDrive



Do not use the recent files option in the OneNote **desktop app** the **first** time you reopen your notebooks, as those links will be invalid following migration.

Use the following instructions to reopen your notebooks from OneDrive online.

9.4. Open the online version of OneDrive by clicking the **OneDrive** icon (1) on the **Windows Taskbar** and selecting the **View online** (2) option.

OneDrive - Na	ational Grid	ŝ	
C Open folder	Uiew online R	ecycle bin	
1	🕨 💿 🔿 🕹	13:26:12 30/08/2024	<b>A</b>

9.5. Ensure **Home** is selected in the left menu (1), then click the **More** button in the main screen (2) and select OneNote (3).

Home - OneDrive X	+	
← C A ⊕ https://nationalgr	idplc-my.sharepoint.com	
🗰 📥 OneDrive	Search	
+ Create or upload	Recent All Word Excel PowerPoint PDF	
John Doe	Name	Microsoft Lists
Home 1	My Notebook 1h ago	<ul> <li>Videos</li> <li>Loop</li> </ul>
옹 Shared	Test 1h ago	Whiteboard
☆ Favorites ⑩ Recycle bin	MigrationTesting Digital Workplace Services-Platform - Directory Serv 2h ago	PowerBI

- 9.6. The Recent file area should show your most recently used OneNote notebooks.
- 9.7. Click the more icon (1) next to the notebook, then select **Open > Open in OneNote**.

Recent All Word Excel PowerPoint De PDF Thore						
Name	Opened	Owner				
Albert @ National Grid My Files	1 🔸 Yesterday at 4:08 PM					
Technical Notes My Files	②	en in browser en in OneNote				
Global AD Migration GRP-INT-UK-Skynet - Windows 11 - Global AD Migration	년 Share	•				
	★ Unfavorite					
	Add shortcut	$\mathbf{e}$				

9.8. If you see a message similar to the one below, choose Always allow... and click Open.



- 9.9. The notebook should open in the OneNote desktop app and synchronisation between the local desktop version and the copy on OneDrive will resume.
- 9.10. Return to the online recent file list and repeat the above steps for each notebook you want to access from your desktop OneNote app.

#### 10. My Support / ServiceNow

10.1. Navigate to <u>https://nationalgrid.service-now.com/mysupport</u>. Check that you are automatically signed in with your profile and that you can view historical/open requests.

#### 11. Mobile Devices

- 11.1. If you use a mobile device then you will be **logged out** of your National Grid O365 applications and be prompted to re-authenticate, this includes **Office**, **Zscaler** and other corporate apps.
- 11.2. You should use your email address when re-authenticating to your mobile apps.
- 11.3. Signing in will result in having to use MFA to reauthenticate to the applications.

#### 12. Other applications

12.1. Check that any SSO (single sign-on) browser-based applications you use (such as those used for timesheets, expenses, holiday booking and any other key applications accessible from *Grid:home*) still login and function correctly, with any historical information still available.



Due to the security of the National Grid environment, you will likely receive MFA prompts post migration; once these have been completed your new Global AD account will result in fewer prompts overall if you sign-in using a Windows Hello for Business key (e.g. PIN, face, fingerprint).

You may find your old username cached on webpages, in these situations you should either sign out and back in or select **sign in with a different account**.

# Troubleshooting

### Unable to logon with your new email

#### Cause

The probable cause is that your device has not been able to connect to Microsoft Azure over the Internet to authenticate and learn your new logon details. This may be due to an intermittent network/Internet connection issue on your device or local network.

### Resolution

Contact the migration team and restart your device. Recheck your Zscaler connection details.