



SSP Pure Broking – Upgrade to Microsoft Azure Cloud

As part of SSP's ongoing commitment to our Brokers, we are transforming the hosting service that we provide by moving to the Microsoft Azure Cloud. This investment is part of our commitment to bring SSP brokers the latest hosting experience with all the benefits associated with one of the world's leading cloud providers. This is an exciting step for SSP and its Pure Broking users, enabling you to enjoy the solution reliability, security and scalability associated with the Microsoft Azure Cloud technology and infrastructure. Alongside this we are delivering an upgrade to the e-mail infrastructure and Microsoft Office applications that we provide for customers who subscribe to those services.

Once the upgrade to the Microsoft Azure Cloud has been completed, the functionality and user experience will be very similar to the current experience, however there will be a few small functional differences that you will notice.

Important Points to Note

1. As part of preparing for the migration, we have asked you to download a new piece of software – the Microsoft Remote Desktop Client. From the live date given to you by the SSP Migration Team you will use this to login to SSP Pure Broking using the new credentials that you have configured. Your old credentials will automatically become defunct on your migration day and you will no longer be able to login via the webpage you currently login to.
2. When logging off from the Pure Broking in the Azure Cloud it is important that you press the 'Log off' button on the 'User Login: Details' screen. Using the X icon in this window can cause login issues when trying to reconnect.
3. Any existing disabled user accounts will be deleted. If you have a disabled user that might need to be re-enabled, i.e. returning from maternity leave, you will need to request a new user account for this user at the appropriate time.
4. By design and in the interests of data security, internet browsing from within the SSP applications in the Azure Cloud is locked down to essential SSP services only. This means that anytime a web-browser is launched, i.e. when opening PDF's or processing an integrated card payment, you will not be able to use the browser to navigate to another website. For brokers using SSP's hosted email service, this also means that you will not be able to click to open links from within the Microsoft Outlook application. If you still wish to access the links, there are two ways you can attempt to do this:
 - a) Try to copy the link and paste it into the internet browser on your local machine (we are aware that not all 'links' can be copied)
 - b) Alternatively, access your SSP hosted email via a web browser running on your local workstation / laptop which you can do by going to <https://outlook.office.com> and entering your email credentials where prompted.

We have received some feedback from our customers that by running local outlook on your workstation / laptop, that you lose the ability to archive emails / documents in emails to Documaster. With this in mind, we are developing a new archive plugin which can be used locally, giving you similar functionality to that which you use when accessing the SSP hosted email service. This means you will be able to enjoy the archiving functionality you are familiar with, and still access links in emails without comprising the security model in the Azure Cloud.

This new feature is expected to be available for our Azure hosted customers in December for customer testing, and for live use shortly thereafter. We will share further news in due course.

5. For brokers using SSP's hosted email service, any suggested contacts in Outlook will be forgotten as part of the upgrade. This means that when typing into the 'To', 'Cc' or 'Bcc' field in Outlook past contacts will not appear. You should make sure that you save any contacts you wish to keep. You can do this by right clicking on the email address and clicking 'Add to Outlook Contacts'.
6. Any current email signatures set up in Outlook will not be carried across to the new service. These will need to be recreated once your migration is completed.

Frequently asked questions relating to the upgrade to Microsoft Azure Cloud and Microsoft Office upgrade.

Microsoft Azure Cloud Hosting – FAQs

1. **Will Pure Broking look and work the same?** Yes, the look and feel of the Pure Broking application will remain the same. Once logged in you will see the screens you are familiar with. The upgrade will change how you log into Pure Broking by doing away with Citrix. It will provide access to a more modern, yet familiar desktop experience with enhanced security, reliability and performance.
2. **What is Microsoft Azure Cloud?** Microsoft Azure, commonly known as 'Azure,' is Microsoft's public cloud computing platform. It provides world leading cloud computing services to well-known technology brands, such as HP and Fujitsu, as well as being utilized by Microsoft themselves.
3. **How is 'Azure' different to what we have now?** At present SSP provide and maintain all the hardware that underpins the Pure Broking hosted service. In future, SSP will use Azure to provide this 'as a service' to us enabling SSP to focus more of our R&D investment on our customers' needs and latest market innovations.
4. **Is my data secure?** We have chosen the Azure platform precisely because they provide one of the most secure services in the market. Microsoft delivers state-of-the-art security across their global data centers. Alongside this, SSP employs leading cyber-security controls and software, and the security of our environments is independently verified using rigorous third-party penetration testing.
5. **Can Microsoft access my data?** There are strict controls in place that mean Microsoft, or its employees, do not have access to SSP client's data.

6. **Will I need any new hardware to access the new system?** We wrote to you in March outlining minimum technical specifications. If your hardware already meets these [specifications](#), we do not expect you to experience problems. If you are not running a supported version of Windows, you will not be able to download the required Microsoft application. Running out of date hardware and software is a security risk because it cannot be kept up to date with the latest security standards.
7. **How do I find out what version of Windows I am running?** Using the search function on your taskbar, search for 'Winver'. This will present a command to run and when run will give you your Windows version information.
8. **What do we need to do?** Using the guide we have provided, download Remote Desktop client on each user's machine. You will then need to follow the steps outlined in the guide - you can do this in advance of your go-live day. Once you have downloaded the Remote Desktop client you will be able to login using the credentials provided, set a new secure password, and get configured for MFA. You should complete this for all users ahead of the go-live day. On your go-live day, the login that you have created will be populated with your SSP applications.

Brokers running SSP's hosted email service will need to collaborate closely with our migration team to complete the smooth upgrade of your SSP e-mail service. We will be asking you to confirm which mailboxes need to be migrated and make changes to your DNS and MX records at the appropriate time. Do you know who looks after your domain?

9. **Will the upgrade affect my access to anything else we use, i.e., Insurer Portals, Gmail ?** No, whilst we are changing how you connect to Pure Broking, this will not change how you use and interact with the non-SSP elements of your machine.
10. **How Does Printing Work?** The Microsoft Remote Desktop client will automatically detect the printers available on your local machine and present these to you for use with any of the hosted applications. SSP recommend that testing of all your printers is conducted prior to migration. This testing should mirror the printing activities conducted as part of your business processes, e.g. double-sided printing, printing from a specific tray, printing in booklet form, etc.

Microsoft maintain a list of supported printers which is available via the following link:
<https://learn.microsoft.com/en-us/universal-print/fundamentals/universal-print-printer-list>

If your printer is not listed by Microsoft, it does not mean your printer won't work. This would be proven by testing your printer and its capabilities.

11. **How do I access my shared and company drives?** These will be presented to you via the Microsoft Remote Desktop client alongside your other SSP applications, in a similar way to now.
12. **Will all my data be migrated to the new system?** Yes, all your data and system configuration (including letter templates) will be migrated to the new hosting service.
13. **In an email I received, it mentioned that file permissions in the company drive may change, what does this mean?** Some of our brokers use the company drive (commonly known as the S Drive) to store potentially sensitive information, such as HR or employee information, and they use user and file


permissions to limit access to this information. It is possible that some of these permissions may be lost during the migration process, you should therefore ensure that no potentially sensitive information is stored in the Company (S Drive) whilst we complete the migration process. Information stored in users' personal drives (commonly known as the H Drive) are NOT affected.

- 14. Will I be able to do the migration if my staff are on annual leave?** Yes. Your users will be able to complete the steps required well in advance of your migration date so that they are ready to login to the Microsoft Azure Cloud on their return. The steps required are straightforward and quick to complete, so even if users do not complete them ahead of time, they will be able to get up and running quickly on their return.
- 15. I'm in the process of migrating away from SSP, do I need to worry about the upgrade?** We are not expecting to upgrade you if your contract terminates prior to 31 December 2024. If you will still be using SSP into 2025 then you will be included in the upgrade program. **PLEASE NOTE** - We often find that brokers need more time than they think to complete the closedown of their SSP system and need to maintain access to their SSP system for at least a few months more than they expected. If your current plan is your SSP agreement to terminate in November or December 2024 please validate that this is still your expectation. We expect to have completed our migration process by November and therefore will have wound down our migration team. Where plans change after this date, you would be subject to a bespoke migration program which would be chargeable on a time and materials basis.

Microsoft Exchange Migration FAQ's

- 1. Do I need to make any preparations for the changes to my e-mail?** Yes, to ensure the improvements to your e-mail go smoothly we will need you to nominate a point of contact (and supply their contact details), provide a list of e-mail accounts and mailboxes to be migrated, contact your domain provider to add new text record(s) to your DNS (Domain Name System) and amend your MX and SPF records.
- 2. What is a domain?** A domain name is a unique, easy-to-remember address used to access websites, such as 'google.com', and 'facebook.com'.
- 3. What is a DNS?** A DNS (Domain Name System) is the system that indicates to what specific IP address e-mails need to be sent.
- 4. What is an MX record?** An MX (Mail Exchange) record is the key that ensures e-mail sent to your company is delivered to the correct place.
- 5. What is an SPF record?** An SPF (Sender Policy Framework) is used to indicate to mail exchanges which hosts are authorized to send mail for a domain.
- 6. How do we change our records for the upgrade?** You will need to contact your hosting provider with the specific data we provide closer to your upgrade to ensure step 1 - verification that you own/we can use your domain for the new service (this needs to be done ASAP) and step 2 (evening of go live) ensuring your provider adds the relevant records to ensure mail is sent to the new service.
- 7. What are the implications of NOT changing the MX / SPF record?** You WON'T be able to send/receive e-mails.

8. **When do I need to change my MX/SPF records?** On your 'Go-Live' Day, we will agree this date with you.
9. **Can I update my MX record in advance of the go live?** No. The new service will not be in use until the go-live day. If you update your MX record early, all inbound e-mails will attempt to be delivered to the new service, which will fail on the basis that those services are not yet live.
10. **What do I say to my internet/website hosting company?** If you are not sure what to say to your internet provider or website hosting company, we suggest that you call their technical support team and tell them "I need to change the DNS mail exchange records as my e-mail provider has changed the e-mail host name."
11. **After the change, will I stop receiving e-mail?** No. All incoming e-mail will be routed to your mailbox, but your SPF and MX records MUST be updated on your Go-Live Day.
12. **Will I still be able to send e-mail?** Yes, but your SPF and MX records MUST be updated on your Go-Live Day.
13. **Will all our e-mail be available after the migration?** Yes, all e-mail will be available.
14. **Will my e-mail address change?** No. Your e-mail addresses will be unchanged.
15. **Will I need to change my signature?** Yes. Your current settings will not be passed onto the new service.
16. **Will my suggested contacts migrate ?** No, your suggested contacts will not be passed into the new service. You will need to save these as contacts, or find these using your previously sent items.
17. **What will the storage limit of my mailbox be?** Your mailbox will have a maximum capacity of 50GB.
18. **What will the maximum size of a single e-mail be?** You will be able to send e-mails of sizes up to 35MB each and you will be able to receive e-mails of sizes up to 36MB. SSP recommends limiting e-mails to under 20MB for compatibility with other providers.
19. **What happens with deleted items?** In Microsoft 365, deleted items have a default retention time of 14 days (about 2 weeks). Items over 14 days (about 2 weeks) old will be automatically removed from deleted items.
20. **Will my mobile device still be able to send/receive e-mail?** Please also refer to the next point. To assist with setting up your mobile devices to receive e-mail a feature called Autodiscover is used. This requires that a CNAME entry is created configured to point at 'autodiscover.outlook.com'.

cname:autodiscover. .co.uk Find Problems			
Type	Domain Name	Canonical Name	TTL
CNAME	autodiscover. .co.uk	autodiscover.outlook.com	60 min
Test		Result	
		DNS Record found	

21. **Will my mobile device still be able to send/receive e-mail?** Not until you change the e-mail settings on your mobile device and point it to the new service. Do NOT make changes to any mobile devices until after your go-live day. Please refer to the Mobile Device Settings below:

MOBILE DEVICES SETTINGS GUIDE

This section is to advise you on how to set your mobile devices.

The location of the fields will vary depending on your mobile devices make, model and operating system version. Refer to your device's instruction manual or technical support for definitive instructions.

As part of the improvement to your email system, we are using a feature called Autodiscover.

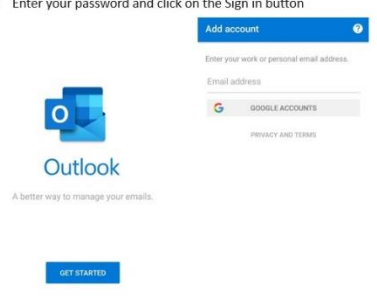
The Microsoft 365 Autodiscover service provides an easy way to configure mobile devices with minimal user input. Most users know their email address and password, and with those two pieces of information you can retrieve all the other details you need to set up your email to the Microsoft 365 service.

The new link will be provided once SSP has verified your domain.

HOW TO CONFIGURE MICROSOFT OUTLOOK ON YOUR MOBILE DEVICES:

ANDROID

- We recommend that you download the latest version of the Microsoft Outlook app from the Google Play store
- Open the Microsoft Outlook app and click on the GET STARTED button.
- Enter your e-mail address and click on Continue
- Enter your password and click on the Sign in button



Confidential. © SSP Limited 2022. All rights reserved

1


CONTINUE >

SSP
SSP - Confidential

MOBILE DEVICES SETTINGS GUIDE

IPHONE

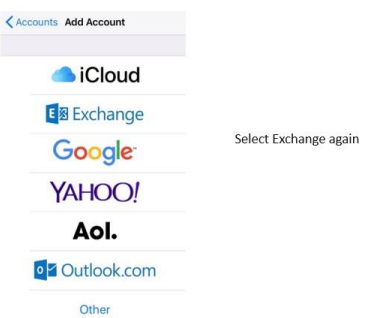
We recommend you use the Exchange option in your mail account configuration panel



Confidential. © SSP Limited 2022. All rights reserved

2

Accounts Add Account



Select Exchange again

CHANGING THE EXCHANGE SERVER ADDRESS

If Autodiscover does not work on your device, you may need to add the server field. SSP can provide you with the new URL if required.

SSP
SSP - Confidential

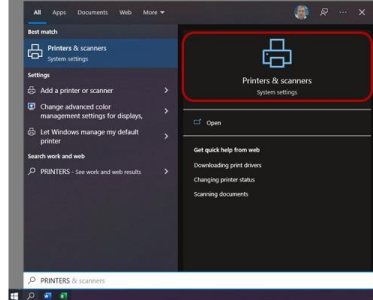
22. **Will the migration affect my calendar and its content?** No, your calendar will be unaffected.
23. **Scan-to-e-mail, will my scanning work be affected?** Yes, to continue scanning you will need to make changes to your scanning device as prescribed in the Scan to E-Mail Settings Guide below:

SCAN TO E-MAIL SETTINGS GUIDE

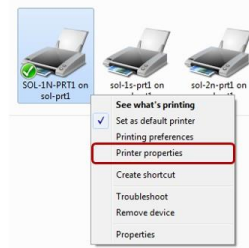
*This guide will advise how to update the SMTP address of your local printers/scanners.
This guide should only serve as a guideline and all tasks should be carried out by your local IT.*

OBTAINING YOUR PRINTER IP ADDRESS

From the Windows Start symbol in the bottom left hand corner of your Taskbar, click on Devices and Printers.



Right-click the printer name, and left-click Printer properties (Not Properties)



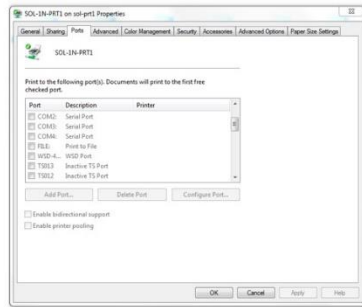
Confidential. © SSP Limited 2022. All rights reserved

1



SCAN TO E-MAIL SETTINGS GUIDE

Click the Ports tab, and widen the first column (Port) to display the full IP address of the printers e.g. 192.0.2.0



OPENING PRINTER SETTING WITHIN THE BROWSER

In order to change the SMTP address you will need to enter the printer settings either from the scanner itself or by accessing the settings from within a web browser.

In the address bar of your preferred browser, type the IP address or host name exactly as it displays on the printer control panel. Press the Enter key on the computer keyboard.

Example of an IP address in a browser window.



LOCATING THE SMTP SERVER ADDRESS FIELD

We cannot advise the exact location of the SMTP Server address, as it will vary depending on the manufacturer and model.

However, it SHOULD be located within the Scan or Network Settings.

Confidential. © SSP Limited 2022. All rights reserved

2



SCAN TO E-MAIL SETTINGS GUIDE

CHANGING THE SMTP SERVER ADDRESS

Once you have located the SMTP address it will either be set to the following or to an IP address:

- mxe1.ssp-hosting.net
- mxe2.ssp-hosting.net
- mxe1b.ssp-hosting.net
- mxe2b.ssp-hosting.net

SSP will confirm the updated information. SSP will require the public IP address of the scanner/office.

No other settings are required to change. Once the SMTP address has been updated, please save your changes and exit the printer settings.

Confidential. © SSP Limited 2022. All rights reserved

3



24. **What are the supported versions of Microsoft Outlook with Microsoft 365?** If you are accessing Outlook via your Pure Broking login, Microsoft Outlook 2022 will be the version published to your Citrix hosted applications page. If you are using Microsoft Outlook on your local PC and connecting to Microsoft 365 service via Microsoft Outlook Anywhere, please ensure you are using Microsoft Outlook 2016 or later.
25. **I have mailboxes or distribution lists with SSP e-mail addresses, how will they be affected?** SSP owned domains like sirius21.net, ssp-test.co.uk or ssp-mail.com will no longer receive e-mails after your migration date. Any primary address that is a SSP address needs to be changed before the migration can happen. Refer below table for various cases.

Primary SMTP Address	Alias	Comments	Action Required
S.Smith@ssp-mail.com	Sam.Smith@YourCompany.co.uk	SSP domain address as 'Primary SMTP Address' and company domain address as alias	Make Alias as Primary SMTP address; SSP address will be removed
Tommy.Smith@YourCompany.co.uk	Tommy@ssptest.co.uk	Company domain address as 'Primary SMTP Address' and SSP domain address as alias	No impact: SSP addresses will be removed
Mick@ssptest.co.uk	MSmith10@ssp-mail.com , Mick.Smith@YourCompany.co.uk , Mick@YourCompany.org.uk , M@YourCompany.co.uk , Mick.Smith@YourCompany.org.uk	SSP domain as 'Primary SMTP Address' and company domain addresses as alias	Confirm Primary e-mail address; SSP addresses will be removed.
J.Smith@sirius21.net		This might be a case where the mail address should be deleted as there are no company e-mail addresses in alias	Verify if it still receives incoming e-mails. If it still receives external e-mails, the current primary address (if it exists) to be moved to an alias and confirm the new company e-mail address to be used as the primary address.
Cathy.Smith@ssptest.co.uk	CSmith@ssp-mail.com , CSmith@ssp-hosting.com , CSmith@mspmail.local	This might be a case where the mail address should be deleted as there are no company e-mail addresses in alias	Add a note at the bottom of your e-mails, websites to say e.g., sirius21.net will be unavailable after the migration date please use this new address. If it does not still receive e-mails and you would like to keep the contents replace the SSP e-mail addresses with <i>company</i> e-mail addresses.