# NHSmail Portal
## Local Administrator Guide

## Document Version Control

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Using Bookmarks

This guide has been formatted with Bookmarks so you can intuitively navigate around each of the sections and easily find the content you wish to learn about. Each Bookmark goes to a different page within the guide.

To use Bookmarks in a guide that you have downloaded and opened in a PDF reader:

1. Click the **Bookmark icon** in the toolbar on the left side of the screen

![Bookmark icon in PDF reader]

2. Click on each of the section titles to view the content you wish to open

![Bookmarks menu in PDF reader]
Using Bookmarks

To use Bookmarks in a guide that you are viewing through a PDF web viewer:

1. Click the **Bookmark icon** in the toolbar on the top right side of the screen.

2. Click on each of the section titles to view the content you wish to open.
As an administrator for the NHSmail platform you will be assigned a role. This role will determine the permissions you will have when performing particular activities on the platform. Below outlines the different roles in the NHSmail platform and the matrix highlights the permission assigned to these roles:

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<tr>
<th>Roles</th>
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<tr>
<td></td>
<td>Create User</td>
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<td>Local Primary Admin</td>
<td>X</td>
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<tr>
<td>Local Admin</td>
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<tr>
<td>Tenant Admin</td>
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<td>Local Helpdesk</td>
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<tr>
<td>Global Admin</td>
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<td>Global Helpdesk</td>
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<td>Audit</td>
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<td>Authorisations</td>
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<td>Connector</td>
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</tbody>
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### Roles and Permissions

<table>
<thead>
<tr>
<th>Roles</th>
<th>Permissions</th>
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<tr>
<td></td>
<td>Create Shared Mailbox</td>
</tr>
<tr>
<td>Local Primary Admin</td>
<td>X</td>
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<tr>
<td>Local Admin</td>
<td>X</td>
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<tr>
<td>Local Helpdesk</td>
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<tr>
<td>Global Admin</td>
<td>X</td>
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<td>Global Helpdesk</td>
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<thead>
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<td></td>
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<tr>
<td>Local Primary Admin</td>
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<td>Local Admin</td>
<td>X</td>
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<tr>
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<tr>
<td>Global Admin</td>
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</tr>
<tr>
<td>Authorisations</td>
<td></td>
</tr>
<tr>
<td>Connector</td>
<td></td>
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</tbody>
</table>
Searching for a NHSmail Portal entry

When performing actions such as editing a user or adding a user to a distribution list you will need to search for the entry in the Portal. This search feature is consistent across the user management, contacts and distribution list screens so it will become a familiar action to complete.

To search for an entry (e.g. user, contact or distribution list):

1. Navigate to the User Management, Contacts, Distribution Lists or Organisations tab by clicking the Admin tab followed by one of the above.

For more information on these sections refer to: User management, Contact management, Administering distribution lists and Organisation attributes.

2. Type the user, contact or distribution list name in the search box in the top right of the page and click the magnifying glass.

You can also use the navigation features at the bottom left of screen to view more users per page (10, 25, 50) or click the numbers in the bottom centre of the screen to move through the different pages of users.

Handy Hint
If you need to narrow your search further, use the advanced search or click Display Name in the tool bar to sort the list in alphabetical order.

Refer to the Advanced Search section for more information on using this feature.

Depending on the action you need to complete, you will select your desired entry by either ticking the box to the left of the name of the target object or double clicking on it.
Using Advanced Search

When searching for a particular User, Contact, Distribution List or Organisation, if the Simple Search feature displays too many Directory entries, you can use the Advanced Search feature to refine your search using multiple criteria. The criteria will vary depending whether you are in User Management, Contacts, Distribution Lists or Organisation screen.

Note: you will only be able to search for User, Contacts and Distribution Lists registered under your organisation.

To use the Advanced Search feature:

1. Navigate to the User Management, Contacts, Distribution Lists or Organisations tab by clicking the Admin tab followed by one of the above.

2. Click Advanced Search at the top right of the page.

3. Type search word(s) into the corresponding Display Name text box (e.g. Kerry) and/or choose relevant drop down box for Mailbox Type/Status.

You can search by typing your criteria in the fields that are displayed at the top of this screen. If you want to change, add or remove fields, refer to Using the Column Picker.

The results of the search will be displayed on the screen. You can search based on more than one display field at a time. Display fields will differ depending on whether you are on the User Management, Contacts, Distribution Lists or Organisations screen.

To go back to viewing the full list of users, delete the text from the search display fields(s).
Using the Column Picker

The column picker can be used to customise the display fields that you can see when browsing lists within the Portal. This makes navigating and searching within different lists easier. There is a column picker on the User Management, Contacts, Distribution List and Organisations screen.

To use the column picker:

1. Navigate to the User Management, Contacts, Distribution Lists or Organisations tab by clicking the Admin tab followed by one of the above.

For more information on these sections refer to: User management, Contact management, Administering distribution lists and Organisation attributes.

2. Click Column Picker at the top right of the page.

3. Select the display fields you wish to view by ticking the box to the left of the field name.

Display fields will differ between the User Management, Contacts, Distribution Lists and the Organisation screen, however the process of selecting is the same.

4. Click OK.
Creating a user account

When a new employee joins your organisation, you must check if they already have an NHSmail account to avoid creating duplicate accounts on the service. If the user doesn’t have an NHSmail account from their previous organisation, follow the instructions in this section. If they do have an account from a previous organisation, refer to the Leavers and Joiners section of this guide.

Once you have created a new account, the user will need to log into their email and sign up to the Acceptable Use Policy for the service. They will not be able to send and receive emails, or use any portal features until they have completed this step.

The details you add when setting up the new account will appear on the NHS Directory and will be searchable by any other user.

Note: if your organisation is connector managed, you should continue to follow local policy for managing accounts

To create a new user:

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu

2. Click Add in the top left of the screen and select User from the drop down menu

3. Enter the Title, First Name, Last name in the appropriate boxes

All fields with an * are mandatory

The display name will be filled in automatically based on the user’s first and last name
Creating a user account

4. Type in any contact numbers, including **Mobile**, **Telephone**, **Pager**, **Fax** and **Job Title** into the designated textbox.

These fields are optional

5. Select an **Email Alias** from the drop down menu.

6. Click **Generate Password** to generate a password for users.

You should follow local guidance on the methods of distribution of passwords to new users. Users will be asked to change their password when they log in for the first time.

7. Select the user’s **Organisation** from the drop down menu.

You will only be able to select an organisation that you have administration rights over.

8. If appropriate, select the user’s **Organisational Unit** clicking the + and – in the expandable list.

If an organisation has Organisational Units set up (Wards/ departments) the plus sign will appear next to the name. If there is no plus sign, the organisation has no Organisational Units set up.
Creating a user account

9. Select the user’s Clinical Speciality, Clinical Role and Work Area from the designated drop down menu.

You can select more than one clinical speciality, clinical role or work area from the drop down menu.

Warning
If you accidentally select the wrong clinical speciality, role or work area, you will need to deselect the incorrect fields before selecting the correct speciality, role or work area.

10. If required, select a Site.

11. If required, enter notes about the user in the Notes textbox.

Other administrators will see these notes when viewing or editing the user account. You should keep these notes up to date so that they accurately reflect any additional information about a user’s account (e.g. on maternity leave until 20th June 2017).
Creating a user account

Click **Create** at the bottom of the page once you have entered all required information for the user’s email account.

The following message will be displayed:

![Success Message]

**Warning**

If information is missing from mandatory fields, you will see the following error message under each missing field. Fields need to be completed before the user can be created.

![Email Alias Error]

**Additional Information**

- Once a user’s account is successfully created you should guide the user to log in at [www.nhs.net](http://www.nhs.net) and use their temporary password provided. On first log in, the user will need to reset their password, accept the Acceptable Use Policy, update their profile and set their security questions. Users will not be able to use NHSmail until they have completed these steps. Please refer the user to the [Portal Getting Started Guide](#) for more information on completing these steps.
- Users will also receive a welcome email as the first email into their inbox. You should encourage users to read this carefully.
- Local Administrators will only be able to create and edit user accounts for organisations over which they have administration rights.
- To edit a user’s account details, refer to the [Edit a User](#) for more information.
Creating a user account

<table>
<thead>
<tr>
<th>Types of Account Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>• <strong>Active (inactive and active)</strong> Current bug which means inactive are included. Once the bug is fixed this will only include Active accounts. User is flagged as inactive after 180 days without activity</td>
</tr>
<tr>
<td>• <strong>Active (Leaver)</strong> Active but marked as a leaver and are in the 30 day leaver window</td>
</tr>
<tr>
<td>• <strong>Deleted</strong> Mailboxes that have been deleted but can be restored as they fall within the 30 day deleted period</td>
</tr>
<tr>
<td>• <strong>Deleted permanent</strong> Means their mailboxes cannot be restored. There is 30 day period after the initial delete in which it is possible to restore mailbox content</td>
</tr>
<tr>
<td>• <strong>Disabled</strong> Local administrator has disabled an account in the portal</td>
</tr>
<tr>
<td>• <strong>Disabled leaver</strong> Local administrator has disabled an account and then marked them as a leaver</td>
</tr>
<tr>
<td>• <strong>Enabling</strong> Normally just presented for a couple of seconds while the user is updated</td>
</tr>
<tr>
<td>• <strong>Locked</strong> User has locked themselves out with too many unsuccessful attempts</td>
</tr>
<tr>
<td>• <strong>Pending</strong> The user is in the process of being created. If a user gets stuck in this state a ticket can be raised with the NHSmail National Help Desk to resolve. This status should disappear after the process has completed</td>
</tr>
</tbody>
</table>
Editing a user account

If you are notified that a user’s account details are incorrect or have changed e.g. change of surname due to marriage or if a user’s subscriptions change, you can edit the user’s information through the User Management screen. Any changes you make will take effect immediately and NHS Directory updated accordingly. Note: if your organisation is connector managed, you should be mindful that any manual edits made using this process may be over-written by the connector if the connector is not also updated with this new information.

To edit a user’s account:

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu.

2. Use the search box to find the user’s account you wish to edit.

Refer to the Searching for an Entry section for more information.

3. Click the Display Name of the user to open the User Details page.

The procedure for editing a user’s account details is very similar to creating a new user account. The information you can change on the User Details page (shown below) is the same as that on the Create User page, with the exception of Changing an email alias, Directory Properties and Service Properties, which are covered later in this section. You can change any of these fields as and when required. Refer to Creating a user account for more information about each field of a user account.
Editing a user account

The User Details page includes a Status box which indicates if the mailbox is active/inactive, the dates it was created/last updated, the email address of the last administrator to edit it and the last time the user logged into their account.

**Handy Hint**

Click **Show Mailbox Statistics** in the status box to view a user’s last logon date, the number of items in their inbox and their quota usage.

Selecting a new email alias

If a user’s name changes (e.g. they get married and their surname changes) you can edit their name through the User Details page. Once the first or last name is changed, you will need to update the user’s email alias to reflect their new name. This change will immediately update the NHS Directory and the old email alias will be retired. Any new emails sent from the user will use the new email address, however the old email alias will still work for inbound emails.

To select a new email alias:

1. **Type in the new name in the First Name/Last Name section within the user details box**
   
   The user’s Display Name will automatically update.

2. **Select a new Email Alias from the drop down menu**

   Local administrators should follow local policy to notify the user of their new email alias. The user’s old email alias will continue to work for inbound emails.

3. **Click Update at the bottom of the page**
Editing a user account

Show mailbox statistics

If you need to know the last date and time a user in your organisation logged in, the number of items in their mailbox or the amount of quota used, you can view this through mailbox statistics.

1. Click **Show Mailbox Statistics** in the Status.

The user’s Display Name will automatically update.

2. Select a new **Email Alias** from the drop down menu.

Local administrators should follow local policy to notify the user of their new email alias. The user’s old email alias will continue to work for inbound emails.

3. Click **Update** at the bottom of the page.
Editing a user account

Viewing a user’s email aliases

You can view a list of the user’s email aliases in a list format if you need to reference an old email alias. Follow steps to re open the user’s account then:

1. Click on Other Email Aliases

The list of the user’s email aliases will pop up

Editing Organisational Unit

To move a user’s account to a different department within the current owning organisation (e.g. switch from Leeds Teaching Hospital IT department to Leeds Teaching Hospital maintenance department) you must edit the Directory properties of the user’s account. These changes will take effect immediately and the user’s details will be updated in the NHS Directory.

To edit the Organisational Unit:

1. Click Edit next to Organisational Unit under Directory Properties

2. If appropriate, click the + boxes to expand the Organisational Unit options and select a new Organisational Unit and click Ok

Note: If a user is moving to a new organisation, you will need to refer to Marking a User as Leaver for information of how to move their account over to the new organisation.
Editing a user account

Editing Clinical Speciality, Role and Work Area

1. Click **Edit** next to Clinical Speciality/Clinical Role/Work Area under Directory Properties and select a new speciality/role/ area from the drop down menu.

   ![Clinical Speciality Edit](image)

   - Clinical Speciality Edit
     - Clinical Haematology
     - Blood Transfusion
   - Role Edit
     - Associate specialist
   - Work Area Edit
     - Accident and Emergency

   You can select more than one clinical speciality, role or work area.

   **Warning**
   If the clinical speciality, role or work area selected are not accurate, you will need to deselect the old fields before selecting the new speciality, role or work area.

Adding Administration Roles

1. Click **Add** next to Admin Roles under Directory Properties.

   ![Service Properties](image)

   - Admin Roles Add
     - Local Admin @ Jupiter Ward

2. Select the required **Admin Role** from the drop down menu.

   ![Add Admin Role](image)

   - Admin Role: Select Admin Role
     - Ad-hoc
     - Authorisations
     - Connector
     - Global Admin
     - Global Helpdesk
     - Local Admin
     - Local Helpdesk
     - Local Primary Admin
     - Tenant Admin

   **Organisation**: Kingsly Court

   **Organisation Unit**: Kingsly Court, Jupiter Ward

   Refer to **Roles and Permissions** for more information about what different roles mean.
Editing a user account

3. Select the **Organisation** to which the admin will have administration rights over from the drop down menu.

4. Click **Add** at the bottom of the page.

When all editing is complete:

5. Click **Update** at the bottom of the page.

The following message will be displayed:

![SUCCESS: Update user request for KING-SMITH, James (LAKEMOORE NHS FOUNDATION TRUST)](image)

If you receive any type of failure notification, refer to **Notifications** for more information on how to address the issue.

**Additional Information**

- You should be mindful that if the user’s account is also connector managed, any changes that you make manually will be overwritten by the connector next time a sync occurs. You should manage the data source within the connector to ensure that an update is made and retained.
Authenticating a user

Before performing an action on a user’s account (e.g. unlocking an account/ resetting a password) you must first be sure of their identity. If the person is not known/recognised you should authenticate the user to verify their identity. You will need to ask them to verify two characters from one security answer and one character from another security answer. Follow your local policy on how to communicate with the user about this information and for guidance on what to do if the user forgets the answers to their security questions.

To authenticate a user:

1. Click **Admin** in the navigation bar at the top of the screen and select **User Management** from the drop down menu.

2. Use the search box to find the account you wish to authenticate.

Refer to the [Searching for an Entry](#) section for more information.

3. Click on the user’s **Display Name** to open the User Details Page.

4. From the User Details Page, click the **Authenticate User** in the **Actions box**.

The user will be required to provide three characters from two of their security questions answers. Ask the user to provide you with the characters requested for each security answer displayed. Answers to security questions are not case sensitive.
Authenticating a user

5 Enter the characters into the corresponding box

If the answer to the security question is correct a green circle with a tick will be displayed. If the answer to the security question is incorrect a red circle with a cross will be displayed. You must not make any changes to a user’s account until all characters to the security questions have been answered correctly.

6 Once the user has been successfully authenticated, click Back at the bottom of the page to return to the User Details page

Additional Information

• You will never be required to ask a user the full answer to their security question
• Answers to security questions are not case sensitive
• Decision regarding the number of failed attempts to answer security questions is made on an organisational basis - refer to your local policy for guidance on this scenario
Enabling and disabling a user account

Disabling an account

There are a number of reasons as to why an account might need to be enabled or disabled. An account may be disabled if, for example, a user is on long-term absence. An account will need to be enabled when a user returns to their organisation. Once an account is disabled, the user will not be able to access their account. If you need to disable/enable multiple accounts at once, refer to Bulk Edit for more information.

To disable a user’s account:

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu.

2. Use the search box to find the account you wish to disable.

Refer to the Searching for an Entry section for more information.

3. Click on the user’s Display Name to open the User Details page.

4. Click Disable in the Actions box.

The following message will be displayed:

Once the account has been disabled you will see the status of the account switch to Disabled.
Enabling and disabling a user account

Enabling an account
Once the user returns to their organisation, you will need to enable their account. If the account is locked, enabling the account will automatically unlock it as well.

Follow steps 1-3 in the previous section (Disable accounts) to select the account you wish to enable.

1. Click Enable in the Actions box.

   ![Actions menu](image)

   The following message will be displayed:
   
   ![Success message](image)

   Once the account has been enabled you will see the status of the account switch to Active.

2. Click Update at the bottom of the page.

Additional Information

- Disabled accounts must be restored within 18 months of the date they were disabled; after that, they can no longer be enabled.
- A user will not be able to access their account or send any emails when it is disabled.
- Once an account is restored, there will be no change to the user’s level of service regarding subscriptions, distribution lists and shared mailboxes.
Deleting and restoring a user account

Deleting an account

You will need to delete an account when a user leaves the NHS permanently (e.g. due to retirement/leaving the NHS) or is not moving to another organisation using NHSmail. Once an account is deleted, the user will lose all access immediately. You should therefore only delete an account when it is no longer required and will not be required in the future. If a user is instead moving to a different NHS trust and will use the account again, you should instead mark the user as a Leaver. Refer to *Marking a User as a Leaver* for more information.

Note: if your organisation is connector managed, please be aware that any manual updates might be over-written by the connector.

To delete an account:

1. Click *Admin* in the navigation bar at the top of the screen and select *User Management* from the drop down menu.

2. Use the search box to find the account you wish to delete. Refer to the *Searching for an Entry* section for more information.

3. Click on the user’s *Display Name* to open the User Details Page. If you need to delete more than one account, you can use the Bulk Edit feature. Refer to the *Bulk Edit* for more information.

4. Click *Delete* in the *Actions* box.
Deleting and restoring a user account

5 Click **Confirm** to delete the user’s account

The following notification message will be displayed when the user’s account is successfully deleted

6 Click **Update** at the bottom of the page to save the changes to the account

The following message will be displayed:

The account will show the status of ‘Deleted’ from the User Management screen

<table>
<thead>
<tr>
<th>Display Name</th>
<th>Mailbox Type</th>
<th>Status</th>
<th>Email</th>
<th>Telephone</th>
<th>Admin Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>TURNER, Jack (LAKEMOORE NHS FOUNDATION TRUST)</td>
<td>User</td>
<td>Deleted</td>
<td><a href="mailto:jack.turner@dev4.wks.accenturenhs.co.uk">jack.turner@dev4.wks.accenturenhs.co.uk</a></td>
<td>020378782656</td>
<td></td>
</tr>
</tbody>
</table>
Deleting and restoring a user account

Restoring an account

You can restore an account that has been accidentally deleted or when an account that was deleted needs to be reactivated e.g. if an account was deleted due to two users having similar names.

To restore an account:

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu.

2. Use the search box to find the account you wish to restore.

Refer to the Searching for an Entry section for more information.

3. Click on the user’s Display Name to open the User Details Page.

4. Click Restore in the Actions box.

The following message will be displayed:

success: Restore mailbox for jack.turner@dev4.wks.accenture.nhs.co.uk
Deleting and restoring a user account

5. Click **Update** at the bottom of the page to save the changes to the account.

The following message will be displayed:

The account will show the status of ‘Active’ from the User Management screen.

<table>
<thead>
<tr>
<th>Display Name</th>
<th>Mailbox Type</th>
<th>Status</th>
<th>Email</th>
<th>Telephone</th>
<th>Admin Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>TURNER, Jack (LAKEMOORE NHS FOUNDATION TRUST)</td>
<td>User</td>
<td>Active</td>
<td><a href="mailto:jack.turner@dev4.wks.accenturenhs.co.uk">jack.turner@dev4.wks.accenturenhs.co.uk</a></td>
<td>02937872522</td>
<td></td>
</tr>
</tbody>
</table>

Additional Information: Account Restoration Period

- An account can be restored for up to 30 days after deletion. Once the 30 day period has past, the account will permanently deleted.
- Following a permanent delete, the email alias will NOT be able to be used again to re-create accounts.
- If an account is restored, it has to be restored to back to its original state prior to deletion.
Unlocking a user's account

If a user has incorrectly entered their password more than three times, their account will move from a status of active to locked. Users will need to contact their Local Administrator to unlock their account before they can access either their email account or the NHSmail portal. To see all the locked accounts that you have administrator rights over, use the Advanced search and choose Locked from the Status drop down list. Refer to Searching and Navigating for more information.

To unlock an account:

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu.

2. Use the search box to find the account you wish to unlock.

Refer to the Searching for an Entry section for more information.

Handy Hint

Use the Advanced Search and search for ‘Locked’ under Status for a list of accounts which have the status of locked.

3. Click on the user’s Display Name to open the User Details Page.

4. Click Unlock in the Actions box.

The following message will be displayed:

You should follow the steps to Reset a User’s Password once the account is unlocked.
Marking a user as a Leaver

When an user leaves one organisation to move to another which is also using NHSmail, their email account can be transferred. To do this, their account must be flagged as a “Leaver”. The employee’s (user’s) new organisation will then pick this up and flag the account as a “joiner”. Once they accept, the user’s details and email account are moved across to the new organisation. If an account marked as a Leaver is not picked up by a new organisation within 30 days their account will be deleted.

If your organisation is connector managed, this process should be managed via a connector and not by the manual steps below.

To flag a user as a Leaver:

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu.
2. Use the search box to find the account you wish to flag as a Leaver.
3. Click the user’s Display Name to open the User Details Page.
4. From the User Details Page, click Mark as Leaver from the Actions box.

The following message will be displayed:

*success: Marked the user plajensen@nhs.net as a leaver of the current organisation.*
Marking a user as a Leaver

The status of the user’s account will be flagged as Active (Leaver) for the next 30 days. If the new organisation doesn’t accept them as a Joiner within this 30 day limit, the account will be deleted.

The user will receive an email to notify them that their account has been marked as a leaver as soon as the Local Administrator has marked the account as a leaver.

Additional Information

- As soon as a user is marked as a leaver from their organisation all their additional subscriptions e.g. bigger mailbox quota will be revoked back to the organisational standard of 4GB. As a result, you should tell any leavers to manage their mailbox quota within 4GB prior to being marked as a leaver to ensure no mailbox content is lost.
- All permissions e.g. shared folder access/ delegate permissions will be revoked.
Accepting a Joiner into your Organisation

Once a user account is flagged as a Leaver, transferring into your organisation, you must accept them as a Joiner within 30 days to successfully complete the transfer. If not, the user’s account will be deleted. You are able to actively monitor the users that have been marked as a joiner to your organisation by following the steps below.

To accept a Leaver into your organisation:

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu.

2. Click on Add at the top right of the screen and then select Joiner.

3. Select your organisation from the organisation drop down menu.

4. Click Add to the right of the Members box.
Accepting a Joiner into your Organisation

5. Use the search box to find the user’s account you wish add as a joiner

Refer to the *Searching for an Entry* section for more information

6. Select the tick box to the left of the user’s display name

<table>
<thead>
<tr>
<th>Display Name</th>
<th>Mailbox Type</th>
<th>Status</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brown, April</td>
<td>User</td>
<td>Active (Leaver)</td>
<td><a href="mailto:april.brown@dev4.wks.accenturenhs.co.uk">april.brown@dev4.wks.accenturenhs.co.uk</a></td>
</tr>
</tbody>
</table>

All users marked as Joiners to your organisation will be displayed here. You can select multiple tick boxes if there is more than one Joiner

7. Click **Select**

8. Click **Complete** at the bottom of the page

The following message will be displayed:

![success]

Additional Information

- If the user’s account is not accepted by the joining organisation within the 30 day period the account will be deleted and the email address used at the previous organisation will not be able to be created again. The user will have to request for a new email address to be set up.
- As soon as the user joins the new organisation their display name will be updated based on the organisation name.
- The user’s old email address (including short-org) will remain for 90 days as an email alias for inbound mail but will not work for outbound email.
Bulk editing users

Bulk edit allows administrators to save time by performing an action (e.g. password resets, deleting or disabling) on more than one user account at a time. For example: you may wish to delete or disable multiple accounts as part of a regular housekeeping process or reset multiple users’ passwords as part of a new starter process.

To bulk edit user accounts:

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu.

2. Use the search box to find the accounts you wish to bulk edit.

Refer to the Searching for an Entry section for more information.

3. Tick the box to the left of the users’ Display Names.

Warning
You will not be able to select shared mailboxes for bulk editing.

4. Click Bulk Edit at the top left of the screen.

5. Click on the Action you want to carry out in the Actions box.
Bulk editing users

For information on the above actions, refer to the following section within this guide

Reset password: Resetting a password for a user
Set Out of Office: Setting an Out of Office on behalf of a user
Delete: Deleting and restoring an account
Disable: Enabling and disabling an account
Enable: Enabling and disabling an account
Unlock: Unlocking an account
Mark as Leaver: Marking a User as a Leaver

You should be mindful that if you reset the password for multiple users in bulk, they will all receive the same temporary password. You must select ‘Change password on next login’ to ensure these temporary passwords are changed at the first opportunity by the user

The process for bulk editing is the same as when editing a single account. Once you have completed the action, a message will be displayed in the top right of the screen, confirming the success or failure for each account included in the bulk update. Refer to Notifications for guidance on what to do if an action is unsuccessful

Additional Information

- Best Practice: It is advisable to make several smaller submissions rather than one large update
- Processing Time: Submissions are processed in the background, and the time taken for this depends on the quantity of updates. Please only submit one CSV at a time and wait for it to complete before submitting another. Uploading items in parallel will cause issues such as duplicate accounts
- Error Handling: In the event of an issue mid-execution, avoid re-submitting the entire file again as it is possible that a portion of the entries were created. Resubmitting could result in duplicates. Check via the Admin User and Mailbox List and Reports section to see which mailboxes were created. Validate the CSV file and adjust it accordingly before proceeding
Managing Mobile Devices

You can view mobile devices that a user has set up to access their NHSmail account. You can also block and unblock devices set up from NHSmail, preventing a device from syncing new items and sending emails. You may want to block a device if the user has lost their device and unblock it if it later found. Only administrators have the ability to block devices.

Viewing Mobile Devices

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu.

2. Use the search box to find the user whose mobile devices you wish to view.

Refer to the Searching for an Entry section for more information.

3. Click on the user’s Display Name to open the User Details Page.

4. Click on Show Mobile Devices in the Status box.

A list of the user’s registered mobile devices is shown:
### Managing Mobile Devices

#### User management

#### Blocking Mobile Devices

1. Select the device(s) you wish to block by clicking on the check box to the left of its name.

**Handy Hint**

You can see whether the device is currently blocked under Access State.

2. Click **Block Device**

The following message will be displayed:

![Success message](image_url)
Unblocking Mobile Devices

1. Select the device(s) you wish to unblock by clicking on the check box to the left of its name.

Handy Hint
You can see whether the device is currently blocked under Access State.

2. Click **Unblock Device**.

The following message will be displayed:

```
success: Unblocked Device successfully for B7583K45H5094L8P93HO5RRGC
```
Resetting a password for a user

You will need to reset a password for users who have forgotten their password. You must authenticate a user before you reset their password to ensure the security of the account is not being compromised. Refer to Authenticating a User for more information. If the account has been locked, this action will automatically unlock the user’s account. You will need to follow local organisation policy to communicate the user’s new password.

To reset a password for a user:

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu.

2. Use the search box to find the account you wish to reset the password for. Refer to the Searching for an Entry section for more information.

3. Click the user’s Display Name to open the User Details Page.

4. From the User Details Page, click Reset Password in the Actions box.

5. From the Reset Password screen, click Generate Password. A random password will be generated.

6. Select the Require Password Change At Next Logon checkbox. This step is good practice and should be selected for all users.
Resetting a password for a user

The user will have to change the temporary password to a new one when they next log in

7 Click Update

The following message will be displayed:

You should provide the user with their temporary password by following your local organisation policy for distributing passwords

Additional Information

- Users can also reset their password from the self-service section of the Portal. Training materials have been provided to users on how to perform this action.
- If the user doesn’t know how to reset their password using the portal, we recommend that you direct them to the Changing Your Password section of the Portal User Guide on the portal where they will find the information they need
Setting an out of office on behalf of a user

You can set an out of office (also known as Automatic Replies) on behalf of a user who is unable to set it themselves, for example they forgot before going on leave and don’t have access to a computer or are on unexpected sick leave. Once the out of office is set, anyone sending an email to the user’s mailbox will receive an automatic response with the message you set following the steps below. This function should only be used when the user is unable to set their out of office themselves.

To set an out of office for an account:

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu.

2. Use the search box to find the account you wish to set an out of office for.

Refer to the Searching for an Entry section for more information.

3. Click on the user’s Display Name to open the User Details Page.

4. From the User Details Page, click the Set Out Of Office button in the Actions box.

5. Ensure that the Send Out Of Office Replies button is switched to On.
Setting an out of office on behalf of a user

6. Enter the **start date** by clicking the calendar icon and choosing the date or typing the date in the following format dd/mm/yyyy – e.g. 15/09/2016

7. Select the **start time** for the out of office by selecting the hour and then set the minutes.

8. Enter the **end date** that you want the out of office to end by clicking the calendar icon or typing in the date.

You can leave the end date blank if the user is out of the office indefinitely.

9. Select the **end time** for the out of office by selecting the hour and then set the minutes.
Setting an out of office on behalf of a user

Please refer to your local organisation’s policy for any requirements on setting an out of office

Send reply to users within the organisation

Send reply to users outside the organisation

Click **Update** at the bottom of the page

The following message will be displayed:

![success: Set Out Of Office for pia.jensen@nhs.net](image)

**Additional Information**

Out of office replies can also be set by end users in both Outlook Web App (OWA) and the Outlook desktop application. Training materials have been provided to users on how to do this in the Outlook Web App Learning Series.

Examples of when you need to set an out of office on behalf of a user are:

- Unexpected absences from work where the user has not been able to set their automatic reply
- A user leaves the organisation and a re-direction notification is required

Note: an out of office message will only be sent to the sender once across the whole period of absence. The automatic reply will not be received every time a new email is sent to the out of office recipient.

If the user doesn’t know how to set an out of office, we recommend that you direct them to the **Sending and receiving emails module** on the NHSmail training and guidance pages where they will find the section “Setting automatic replies”
Setting a mailbox delegate

If a user is due to go on leave, or they need an additional person to manage their mailbox (e.g. an assistant), you can set up delegates to manage their mailbox. Mailbox delegates can also be set by end users in both Outlook Web App (OWA) and the Outlook desktop application. You should only set delegate access on behalf of a user in line with local organisation policy when they are unable to do it themselves, e.g. unexpected absence and they do not have access to a computer. You can set the following access levels: full access, send emails on behalf of the account owner or can send emails as the account owner.

To set a mailbox delegate for a user’s account:

1. Click **Admin** in the navigation bar at the top of the screen and select **User Management** from the drop down menu.

2. Use the search box to find the account for which you wish to set up delegate access. Refer to the *Searching for an Entry* section for more information.

3. Click on the **Display Name** to open the **User Details** page.

4. Click the **Delegate Mailbox** button in the **Actions** box.
Performing actions on behalf of users

Setting a mailbox delegate

There are three different levels of delegate mailbox access:

Send As: this permission allows the delegate to compose and send emails which appear to have been sent by the mailbox owner, from the owner’s mailbox itself.

Send on Behalf: this permission allows the delegate to compose and send emails from the owner’s mailbox, but recipients will see in the From line, that the message has been sent by the delegate on behalf of the mailbox owner.

Full access: this permission allows the delegate to open the owner’s mailbox and behave as the owner (including the ability to read, delete and write emails and create subfolders).

5. To set delegate permissions, click on Add under the relevant permissions box.

6. Type in the delegate’s name into the search box.

You can narrow results by using Advanced Search e.g. filtering by organisation or searching for the user’s email address. Refer to the Searching for an Entry section for more information.
Setting a mailbox delegate

7. Select the tick box to the left of the delegate’s display name and click Select.

You can tick multiple boxes to add multiple delegates.

If you need to remove a delegate, click remove under their email address.

8. Click Update at the bottom of the page.

You will be directed back to the Edit User Page.

9. Click Update at the bottom of the page.

The following message will be displayed:

```
success: User AddAndRemoveMailboxDelegate
pra@jensen@nhs.net successful
```

Additional Information

- If the user doesn’t know how to set mailbox delegates, we recommend that you direct them to the *Delegated and Shared Mailboxes* module on the NHSmail 2 training and guidance pages where they will find the section “Giving delegate access to your mailbox”
Bulk uploading users via CSV files

If you need to create a large group of users in bulk, you can do this by uploading a CSV (comma separated values) file containing the users’ details. Before you upload the CSV file, you must ensure the data is formatted correctly, using the same headings and in the same order as in the sample file. You can download this file from the Upload Users Screen by clicking on the sample file hyperlink in the instructions at the top of the page. You should always check whether a user already exists in the system before bulk uploading new users. You can generate a complete list of current users, by running the Mailbox Report through the NHSmail Portal to check.

The CSV upload also supports the old NHSmail 1 CSV file format. Any upload that does not follow the sample file or the NHSmail 1 format will not successfully validate. The CSV upload process follows a two step process; 1) Validate CSV file 2) Create Users. This approach is an alternative to the traditional connector management approach and can be used in parallel or as a new method of user bulk upload.

1) CSV File Validation

To upload a CSV file:

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu.

2. Click on CSV Upload on the top tool bar.

3. Click on Browse.
Bulk uploading users via CSV files

4 When you have found the CSV file, click on it and click Open

![Image of CSV file explorer]

5 Click Validate

![Image of file validation results]

The file will then be validated and a message displayed to let you know whether the validation has been successful or if there are any errors in the CSV file. Validation errors are usually due to formatting or syntax errors. The list of file validation results will indicate the location of any errors on a line by line basis.

Below is an example of what you will see if the CSV file has failed its validation

You must make the required change to the erroneous lines within the CSV file and follow steps 1-5 to re-upload the file for a successful validation.
Bulk uploading users via CSV files

Below is an example of where the file has successfully validated

![File validation results]

2) CSV User Creation

Once the file has successfully validated, the next step is to upload and bulk create the users’ accounts

1. Click **Upload** at the bottom of the page

![User creation and update results]

If you are uploading a large file, this upload might take some time. You are able to leave the bulk upload screen and can refer to the notification screen by clicking on the notifications icon at the top right of the screen to see the status of the file upload as seen in the screenshot below. You can continue to work on other tasks whilst a CSV upload is in progress

![Notification table]

The following message will be displayed:

![Success message]

You will also receive an CSV results email. This results email will have the uploaded CSV file attached with an additional column which contains the result of each user creation
Bulk uploading users via CSV files

Additional Information

- **Best Practice:** It is advisable to make several smaller submissions rather than one large update.
- **Processing Time:** Submissions are processed in the background, and the time taken for this depends on the quantity of updates. Please only submit one CSV at a time and wait for it to complete before submitting another. Uploading items in parallel will cause issues such as duplicate accounts.
- **Error Handling:** In the event of an issue mid-execution, avoid re-submitting the entire file again as it is possible that a portion of the entries were created. Resubmitting could result in duplicates. Check via the Admin User and Mailbox List and Reports section to see which mailboxes were created. Validate the CSV file and adjust it accordingly before proceeding.
- **There is a maximum of 10,000 accounts which can be created at one time via CSV file upload.**
- **When using a CSV file to create users, their email address will be generated automatically and added to the results email you receive.**
- **You cannot bulk upload Contacts.**
- **The following fields can be left blank: title, mailbox size, Organisational Unit, any phone number, passwords. If you leave title or phone number blank they will remain blank in the Directory.**
- **If you do not include passwords as a column, a new password will be auto-generated for the new users and you will be able to view this password in the results email. You should follow your local policy guidelines for distributing email address and passwords to users.**
- **If you don’t specify a mailbox size within the CSV file, a default mailbox of 4GB will be used. You will only be able to specify a larger mailbox than 4GB if your organisation has purchased this top-up service. An error message will appear in the CSV file if this is attempted.**
- **If you do not specify an Organisational Unit for the user e.g. (department), the users parents organisation will be assigned and will need to be edited through the user edit screen. Refer to **Editing a User** for more information.**
CSV Uploads

Updating users in bulk via CSV files

CSV User Update

You can also use the CSV functionality to bulk update user accounts. If you have updated a CSV file with up-to-date user information, this file can then be re-uploaded to the Portal to update the user’s NHS Directory entry. You must ensure that the user’s unique local ID aligns with that of the current Directory so that user accounts are not duplicated. To generate a list of users’ current local IDs Local Administrators can run the Mailbox Report through the NHSmail Portal.

1. Follow steps 1-5 of the previous section (Bulk upload) to upload a CSV file with updated user information

When the file is successfully validated, you will be notified that the accounts already exist and that these accounts will be updated

Warning
If you do not get a message that the user accounts already exist and will be updated, review the local ID codes in the CSV file before proceeding to avoid duplicating accounts

2. Click Upload at the bottom of the page

The following message will be displayed:

You will also receive an CSV results email. This results email will have the uploaded CSV file attached with an additional column which contains the result of each user account update
Additional Information

- **Best Practice**: It is advisable to make several smaller submissions rather than one large update.
- **Processing Time**: Submissions are processed in the background, and the time taken for this depends on the quantity of updates. Please only submit one CSV at a time and wait for it to complete before submitting another. Uploading items in parallel will cause issues such as duplicate accounts.
- **Error Handling**: In the event of an issue mid-execution, avoid re-submitting the entire file again as it is possible that a portion of the entries were created. Resubmitting could result in duplicates. Check via the Admin User and Mailbox List and Reports section to see which mailboxes were created. Validate the CSV file and adjust it accordingly before proceeding.
- **When updating users via CSV**, the password field cannot be updated so there is no need to include a password column. The users’ password will remain the same.
Creating a shared mailbox

A shared mailbox (also known as a generic mailbox) is a type of mailbox that can be accessed by a group of users from the same organisation. The shared mailbox may be used for several reasons (e.g., a district nursing team may have a shared mailbox for incoming referrals that the entire team has access to so anyone on duty can read or action the email). To access the shared mailbox users must first be granted ‘Send As’ or ‘Full Access’ permissions by their local administrator.

To create a shared mailbox:

1. Click **Admin** in the navigation bar at the top of the screen and select **User Management** from the drop down menu.

2. Click **Add** at the top left of the screen and select **Shared Mailbox** from the drop down menu.

3. Type the shared mailbox **Display Name** into the text box.
   
   Display names must be less than 30 characters and contain no special characters, numbers or spaces.

4. Select the **Organisation** from the drop down list.

5. If appropriate, select the **Organisational Unit** by clicking the + next to the organisation name to expand the list.
Creating a shared mailbox

6 Type the shared mailbox **Email Name** into the text box

An email address will be automatically generated after the Email Name is entered. It will begin with the organisation short name.

7 Click **Hide from address lists** if you would not like the shared mailbox to display in the NHS Directory.

If you do not click this box, users of NHSmail will be able to search for the shared mailbox on the NHS Directory, but will not be able to see who the members of the shared mailbox are. Only users of Outlook Desktop Application will be able to view the members of a shared mailbox.

8 Enter a description of the mailbox which will be shown in the directory.

Note: the maximum length of the description field is 1024 characters.
Creating a shared mailbox

Setting shared mailbox permissions

‘Send As’ permission allows a user to send emails from the shared mailbox email address. The message will appear to have been sent from the shared mailbox and will have no affiliation to the user’s personal email address.

To select users with ‘Send As’ permissions for the shared mailbox:

1. Click **Add** in the **Send As** box

2. Type the user’s name into the **search box**

   You can also use the navigation features at the bottom of the user list

3. Select the **tick box** to the left of the user’s name

4. To add multiple users, tick the box next to their name

**Handy Hint**

Use the advanced search to narrow the results by for example status or organisation.
Creating a shared mailbox

4. Click **Select** at the bottom of the page

‘Owner’ permissions allows a user to open the shared mailbox, view incoming emails and send emails from the shared mailbox email address. They will be responsible for managing all further permissions for the shared mailbox.

To select users with ‘Owner’ permission for the shared mailbox:

5. Click **Add** in the **Owner** box

You can add yourself as an owner by clicking “Add Myself As Owner” checkbox.

Follow steps 2 - 4 above to select the users who will be granted this permission.

A mailbox owner should be encouraged to manage the mailbox themselves e.g. add additional users to the mailbox through Outlook Web App. For more information on performing these actions, direct users to **Delegated and Shared Mailboxes** on the NHSmail training and guidance pages.

If you accidently grant a user ‘Send As’ or ‘Owner’ permissions, click on the red cross:

6. Click **Create** and the following message will be displayed:

Additional Information

- For all information on policies and procedures related to Shared Mailboxes refer to the Shared Mailbox Guide for NHSmail located under Help.
- Refer to the **Editing a Shared Mailbox** for more information on how to change any shared mailbox attributions following creation.
- You will not be able to set an out of office on a shared mailbox, this should be managed by the shared mailbox owner in Outlook Web App.
Editing a shared mailbox

If the details associated with a shared mailbox are incorrect or if you need to add or amend ‘Send As’ or ‘Full Access’ user permissions you can edit the shared mailbox through the User Management screen. Any edits you make will have immediate effect and will update the NHS Directory accordingly. You will require the edit shared mailbox permission level in order to perform this action.

To edit a shared mailbox:

1. Click **Admin** in the navigation bar at the top of the screen and select **User Management** from the drop down menu.

2. Use the search box to find the shared mailbox you wish to edit.

Refer to the *Searching for an Entry* section for more information.

3. Click the **Display Name** of the shared mailbox to open the Edit Shared Mailbox page.

Although the Edit Shared Mailbox page (shown below) looks slightly different to the Create Shared Mailbox page, the steps to edit a shared mailbox are the same as when you create (with the exception of Directory properties). All editing steps are optional and can be updated as and when required. Refer to *Creating a shared mailbox* for more information on editing each part of a shared mailbox.

The Shared Mailbox page includes a Status box which indicates if the mailbox is active/inactive, the dates it was created/last updated and the email address of the last administrator to edit it.
Administering shared mailboxes

Editing a shared mailbox

Editing a shared mailbox Organisational Unit:

To move a shared mailbox to a different department within the current owning organisation (e.g. switch from Leeds Teaching Hospital IT department to Leeds Teaching Hospital maintenance department) you must edit the Directory properties of the shared mailbox. These edits will have immediate effect and will update the shared mailbox entry in the NHS Directory.

To move a shared mailbox to a new Organisational Unit:

1. Click on **Edit** next to Organisational Unit under Directory Properties.

   ![Directory Properties](image1)

2. If appropriate, click the + box to expand the Organisational Unit list and select a new Organisational Unit and click **Ok**.

   ![Edit Organisation Unit](image2)

   Note: To change the owning organisation, rather than switching the shared mailbox between different departments within the same organisation, you will need to use Transfer in the Actions box. Refer to **Transferring a shared mailbox** for more information.

When all editing is complete:

3. Click **Update** at the bottom of the page.

The following message will be displayed:

![Success](image3)

If you receive any type of failure notification, refer to **Notifications** for more information on how to address the issue.

**Additional Information**

- For all information on policies and procedures related to Shared Mailboxes refer to the **Shared Mailbox Guide** located under Help.
Transferring a shared mailbox

Shared mailboxes can be transferred from one organisation to another, when, for example, an organisation closes down and a new organisation takes over ownership of the shared mailbox. You will be able to move the shared mailbox from the original organisation to the new organisation as long as you have administrative rights at both organisations. If you do not have administration rights at both organisations, you will not be able to perform the transfer. If you do not have administration rights at both organisations, contact one of your Local Administrators who has those permissions or the NHSmail National Help Desk.

To transfer a shared mailbox:

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu.

2. Use the search box to find the shared mailbox that you wish to transfer.

3. Click the shared mailbox Display Name to open the Edit Shared Mailbox Page.

4. Click Transfer in the Actions box.

5. Select the New Organisation from the drop down menu and click Transfer.
Transferring a shared mailbox

The following message will be displayed:

The shared mailbox owner will receive an email detailing that the transfer was successful

Additional Information

- The organisation’s short display name prefix on the shared mailbox will be updated to the new organisation
- Old email aliases are retired but will still work for receiving email
- Following a transfer, the status of the shared mailbox will remain enabled and will not need to be re-enabled
- There will be no changes to shared mailbox permissions, but these should be reviewed by the owning organisation of the shared mailbox following the transfer to ensure all users’ work at the new organisation
Deleting a shared mailbox

When a shared mailbox is no longer required or used, you should delete it so that users cannot access it. This action will remove the mailbox from the NHS Directory. You must follow local organisation policy when deleting a mailbox to abide by data retention guidelines. This may involve extracting information from an mailbox and saving locally before the mailbox is deleted.

To delete a shared mailbox:

1. Click Admin in the navigation bar at the top of the screen and select User Management from the drop down menu.

2. Use the search box to find the shared mailbox you wish to delete.

   Refer to the Searching for an Entry section for more information.

   Handy Hint
   Use the Advanced Search and search for ‘Shared’ under Mailbox Type for a list of all shared mailboxes OR click on Mailbox Type to group shared mailboxes.

3. Click on the mailbox Display Name to open the Shared Mailbox Details page.

4. Click the Delete button in the Actions box.
Deleting a shared mailbox

5 Click **Confirm** to delete the shared mailbox

The following message will be displayed:

- **success:** Deleted shared mailbox
  - anhs.robinward@nhs.net
Restoring a shared mailbox

If a shared mailbox is deleted, but needs to be restored (e.g. deleted by accident/ user revokes request to delete the shared mailbox) you can do so within a 30 day period. A mailbox cannot be restored after the 30 days and you will need to create it again.

To restore a shared mailbox:

1. Select the shared mailbox you wish to restore from the user management screen

2. Click the **Restore button** in the **Actions box** on the details page

The following message will be displayed:

![Action Message](image)

**Handy Hint**

Use the advanced search and search for ‘Deleted’ under **Status** for a list of all deleted shared mailboxes.

**Additional Information:**

- Shared mailboxes can be restored within 30 days of the original date they were deleted. After that, they can no longer be restored.
Creating a static distribution list

A static distribution list is used to send an email to more than one person. A static distribution list consists of recipients that have been manually added and remains unchanged until you add or remove new recipients. You can also include recipients external to the NHS. This is different to a dynamic distribution list which automatically updates recipients based on specific NHS Directory criteria. When you create a new static distribution list it will be added to the Directory. You will only be able to create static distribution lists for organisations that you have administration rights over.

To create a static distribution list:

1. Click **Admin** in the navigation bar at the top of the screen and select **Distribution Lists** from the drop down menu.

2. Click **Add** in the top left of the screen and select **Static Distribution List** from the drop down menu.

3. Select the **Owning Organisation** from the drop down menu.

4. If appropriate, select the **Organisational Unit** clicking the + in the expandable list.
Creating a static distribution list

5. **Type in the Name of the Distribution List**

   Names must be less than 50 characters and contain no space or special characters.

   The email address will be created automatically, using the organisation’s short code followed by the name you entered for the distribution list.

6. **Click Add next to Owning Users to add owners to the distribution list**

   You can add yourself as an owner simply by clicking “Add Myself As Owner”.

7. **Type in user’s name into the search box**

   Refer to the *Searching for an Entry* section for more information.

8. **Select the owning user by checking the box to the left of the user’s display name**

   To add multiple owners, tick the box next to their name.

   The owners of the distribution list you create must be inside your organisation.

9. **When all distribution owners are checked click Select**

   If you accidently add a user as an owning user, you can remove them by clicking the red cross next to their email address.

10. **Select Hide this group from address lists if you would not like the distribution list to display in address lists**
Creating a static distribution list

Enter the **Description** for the distribution list in the text box

This description will be seen when a user searches the Directory for the distribution list, so please make the description informative. There is a character limit of 250 including spaces

**Adding authorised senders to static distribution lists**

You must set who will be authorised to send to the static distribution list you create

To set authorised senders:

1. Select whether the **authorised senders** will be only senders inside NHSmail, senders inside or outside of NHSmail including the Internet or select **Specific Senders Only**

If you select Specific Senders Only you will need to add their email address into the appropriate box and select Add. Their names will then appear in the Authorised Senders box

![Authorised Senders]

**Warning**

If you select senders inside and outside of NHSmail including the Internet, anyone who knows the DL can send emails to it

2. Use the search box to find and select authorised senders by checking the box to the left of the user’s display name

Refer to the **Searching for an Entry** section for more information
Administering distribution lists

Creating a static distribution list

Adding recipients to static distribution lists

To add a recipient to a static distribution list:

1. Click Add

2. Use the search feature or the navigation features to find and select Recipients for the Distribution List by checking the box to the left of the user’s display name.

When a recipient is successfully added to the distribution list their name will appear in the Members box. Contact Directory entries show at the end of this list.

3. When all recipients are checked click Select

Check that all details for the distribution list are correct.

4. Click Create

Additional Information

- There is a maximum number of 500 recipients for a static distribution list
- If you wish to add an external recipient (email address other than .nhs.net) you will need to first add the recipient as a contact. Refer to the Contact management module for more information.
Editing a static distribution list

You can update information associated with a static distribution list (e.g. name, owning users, recipients) registered to your organisation. Once a static distribution list is updated, the changes will apply to all future emails sent to this list. You must have the correct permissions to be able to perform this action.

To edit a static distribution list:

1. Click **Admin** in the navigation bar at the top of the screen and select **Distribution Lists** from the drop down menu.

2. Use the **search box** to find the distribution list you wish to edit.

Refer to the *Searching for an Entry* section for more information.

**Handy Hint**
Use the advanced search feature to search for accounts with the ‘Static’ mailbox type.

3. Click on the **Display Name** of the static distribution list to open the Edit Static Distribution List Page.

Although the Edit Distribution List page looks slightly different to the Create Static Distribution List page, the steps to edit a static distribution list are the same as when you create one (with the exception of Directory Properties). Refer to the *Creating a static distribution list* for more information on editing each part of a distribution list.

The Edit Distribution List page includes a Status box which indicates if the list is active/inactive, the dates it was created and last updated and who was the last administrator to edit it.
Editing a static distribution list

Editing the Organisational Unit of a static distribution list

To move a static distribution list to a different department within the current owning organisation (e.g. switch from Leeds Teaching Hospital IT department to Leeds Teaching hospital maintenance department) you must edit the Directory properties of the distribution list. These edits will have immediate effect and will update the static distribution list entry in the NHS Directory.

To move a static distribution list to a new Organisational Unit:

1. Click on **Edit** next to Organisational Unit under Directory Properties

   ![Directory Properties](image1.png)

2. If appropriate, click the + box to expand the Organisational Unit list and select a **new Organisational Unit** and click **Ok**

   ![Edit Organisation Unit](image2.png)

Note: To change the owning organisation, rather than switch the list between different departments within the same organisation, you will need to use Transfer in the Actions box. Refer to the **Transfer static distribution list** for more information.

When all editing is complete:

3. Click **Update** at the bottom of the Edit Distribution List page

   ![Update](image3.png)
Editing a static distribution list

The following message will be displayed:

![Success message: Update distribution list JupiterWard]

If you receive any type of failure notification, refer to the *Notifications* for more information on how to address the issue.

---

**Additional Information**

- Refer to *Create Static Distribution Lists* for more information on policies and best practice.
Creating a dynamic distribution list

Dynamic distribution lists are created from a number of pre-set rules and groups defined by the distribution list owner. When an email is sent to a dynamic distribution list, it will be delivered to everyone within the NHS Directory (i.e. NHSmail) who matches the criteria defined for the group.

Whereas static distribution lists have a list of pre-defined recipients, dynamic distribution lists will deliver to recipients who match the criteria at the time the email is sent. The advantage of a dynamic distribution list is that it accesses live data from NHSmail Portal and therefore does not require active maintenance by the owner e.g. if people leave or join the organisation. However, unlike static distribution lists, it is only possible to set up dynamic distribution lists to include recipients on the NHSmail platform.

Examples of scenarios in which dynamic distribution lists might be helpful include a clinical commissioning group who wants to contact all Chief Execs across multiple organisations, setting up a mailing list for a multidisciplinary teams within the same organisation and a local administrator wanting to contact everyone within their organisation.

There is no maximum number of users that can be included in a dynamic distribution list, but larger groups may need to go through an internal process of approval. When setting up dynamic distribution lists for a large number of users, the following controls are in place to ensure that these lists are checked and approved before they can be used.

Dynamic distribution list controls

<table>
<thead>
<tr>
<th>Condition</th>
<th>Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Dynamic Distribution List has more than</td>
<td>The distribution list must have specific senders set, such that only</td>
</tr>
<tr>
<td>500 recipients</td>
<td>the specified senders will be able to send emails to the distribution</td>
</tr>
<tr>
<td></td>
<td>list</td>
</tr>
<tr>
<td>The Dynamic Distribution List has more than</td>
<td>When the distribution list is initially set up and with every</td>
</tr>
<tr>
<td>50,000 recipients</td>
<td>subsequent change, it must be approved by a Global and Tenant</td>
</tr>
<tr>
<td></td>
<td>Administrator</td>
</tr>
<tr>
<td>The Dynamic Distribution List has recipients</td>
<td>When the distribution list is initially set up and with every</td>
</tr>
<tr>
<td>in multiple organisations</td>
<td>subsequent change, it must be approved by a Local Administrator from</td>
</tr>
<tr>
<td></td>
<td>each organisation. Note: For GP practices the approval shall come</td>
</tr>
<tr>
<td></td>
<td>from the Parent Organisation, and not the Practice itself</td>
</tr>
<tr>
<td>A user who is not an Administrator sets up or</td>
<td>When the distribution list is initially set up and with every</td>
</tr>
<tr>
<td>makes a change to a Dynamic Distribution List</td>
<td>subsequent change, it must be approved by a Local Administrator</td>
</tr>
</tbody>
</table>
Creating a dynamic distribution list

Creating dynamic distribution lists

1. Click **Admin** in the navigation bar at the top of the screen and select **Distribution Lists** from the drop down menu.

2. Click **Add** in the top left of the screen and select **Dynamic Distribution List** from the drop down menu.

3. Select the **Owning Organisation** from the drop down menu.

4. If you know the Organisational Unit the distribution list belongs to, select an **Organisational Unit** (you may have to click the + to see lower levels of detail) and click **OK**.

Handy Hint
You can click the minus sign (-) to collapse the list of Organisational Units to make the page easier to navigate.
Creating a dynamic distribution list

5 Type the **Name** of the distribution list

![Name and Email Address fields]

The email address will be generated automatically

**Note:** Names must be less than 50 characters and contain no spaces or special characters. You cannot use the same name as that of another distribution list that is Active / Pending / Rejected.

To set an owner for the distribution list:

6 Click **Add** next to Owning Users

![Owning Users field]

7 Search for the Owning User and click the tick box next to their name and click **Select**

![User selection from list]

**Note:** you can only select one owning user

8 Select **Hide this group from address lists** if you would not like the distribution list to display in address lists
Creating a dynamic distribution list

9 Enter a **Description** for the Distribution List

Users will see this description when searching for the distribution list in the NHS Directory. There is a character limit of 250 including spaces

Setting authorised senders

1 Choose the category of authorised senders for this distribution list

- **Only senders inside NHSmail**: all users on the NHSmail platform will be able to send emails to the distribution list
- **Senders inside and outside of NHSmail including the Internet**: all users inside and outside of NHSmail including anyone on the Internet will be able to send emails to the distribution list
- **Specific Senders Only**: this allows you to specify which users are able to send emails to the distribution list. Note: you must select this if your distribution list will contain more than 500 recipients

2 Click **Add** next to Authorised Senders

**Warning**

Be aware that if you select **Senders inside and outside of NHSmail including the Internet** any email address will be able to send emails to the distribution list

*Only senders inside NHSmail*: all users on the NHSmail platform will be able to send emails to the distribution list

*Senders inside and outside of NHSmail including the Internet*: all users inside and outside of NHSmail including anyone on the Internet will be able to send emails to the distribution list

*Specific Senders Only*: this allows you to specify which users are able to send emails to the distribution list. Note: you must select this if your distribution list will contain more than 500 recipients
Creating a dynamic distribution list

Administering distribution lists

3 Use the search box to find the account you wish to authorise

Refer to the **Searching for an Entry** section for more information

4 Tick the names of all the authorised senders you want to add and then click **Select**

Handy Hint
If you make a mistake with the list of senders, click the red cross to remove them

Adding recipients to Dynamic Distribution Lists

Recipients are added to dynamic distribution lists based on a number of rules that can be grouped together. You can add multiple groupings of rules to distribution lists

To add a new rule:

1 Click **Add Rule**
Creating a dynamic distribution list

2. Select the first condition for the rule using the first drop down list (e.g. Work Area)

Handy Hint
If you do not include organisation in your rules, you need to use country to avoid the distribution list including recipients in both England and Scotland

3. Select from the drop down whether the condition is 'equal to' (=) or 'not equal to' (!=)
4. Select the second condition for the rule from the drop down list (e.g. Acute Medicine)

Based on the rule above, all users within the NHS Directory who have the work area of Acute Medicine would be added as recipients to the distribution list.

You may wish to add additional rules e.g. recipients must work in Acute Medicine in your organisation. To set additional rules within the same group:

5. Click Add Rule and repeat steps 1-4. Select AND from the drop down if all rules must apply / Select OR if at least one rule must apply

If AND is selected, all subsequent rules must apply to the user in order to be added to the distribution list e.g. if you select Organisation = Aintree University Hospital AND Work Area = Acute Medicine, it will go to everyone working in Acute Medicine in this hospital.

If OR is selected at least one of the subsequent rules need to apply to the user e.g. if you select Role = Midwife Consultant OR Role = Midwife Manager, it would go to users who are either Midwife Consultants or Midwife Managers.
Creating a dynamic distribution list

If you make an error whilst creating a rule you can delete it. To delete a rule:

6 Click Delete next to the rule you want to delete

Grouping rules

Grouping rules allows you to apply multiple rules to determine dynamic distribution list recipients. A group belongs to the rule that sits above it. When you select the AND / OR in the rule that sits above any group, you determine whether all rules and any groups sitting beneath the rule must be true or if only one of the rules or groups needs to be true.

To group rules together:

1 Click Add Group and repeat steps 1-5 from the previous section to set the rules for the second group

In the example above if a user is part of Aintree University Hospital AND the user is either Administrator OR Administrative Assistant, they will be a recipient of this distribution list.
Creating a dynamic distribution list

If you make an error whilst creating a group you can delete it. To delete a group:

2. Click **Delete Group** next to the group you want to delete

Viewing Dynamic Distribution List Recipients

Viewing the target users will help you understand who the recipients of the distribution list will be. You should always review target users as it allows you to determine whether the rules in the distribution list are appropriate to include your target audience. It will also help you determine what controls will apply to the approval of this distribution list. To view all target users of the distribution group:

1. Click **View Target Users** at the bottom of the page

2. When you have reviewed the target users and are satisfied, click **Back**

3. Click **Complete** on the Dynamic Distribution Creation page

Depending on the number of recipients and whether there are recipients across multiple organisations, the distribution list may need to be approved by a Global or Tenant Admin or by Local Administrators in other organisations. Refer to **Dynamic distribution list controls** for more information

**Warning**

If there are many target users, you may experience a delay in loading this page. Only the first 500 recipients will be shown along with an indication of the total number of recipients

**Additional Information**

- Dynamic distribution list rules will only apply to users with an NHSmail account and not NHS Directory contacts
- Contacts cannot be added as Senders or Owning Users
Editing a dynamic distribution list

You can update information associated with a dynamic distribution list (e.g. name, owning users and membership rules) registered to your organisation. Once a dynamic distribution list is updated, the changes will apply to all future emails sent to this list. You must have the correct permissions in order to edit the distribution list.

To edit a dynamic distribution list:

1. Click Admin in the navigation bar at the top of the screen and select Distribution Lists from the drop down menu.

2. Use the search box to find the dynamic distribution list you wish to edit.
   Refer to the Searching for an Entry section for more information.

   Handy Hint
   Use the advanced search feature to search for accounts with the ‘Dynamic’ mailbox type.

3. Click on the Display Name of the static distribution list to open the Edit Distribution List page.
   Although the Edit Dynamic Distribution List page looks slightly different to the Create Dynamic Distribution List page, the steps to edit a dynamic distribution list are the same as when you create one (with the exception of Directory Properties). Refer to the Creating a dynamic distribution list for more information on editing each part of a distribution list.

Warning
If you do not want to make any changes to the distribution list, make sure you click Cancel to close the page. Clicking Update may send the distribution list for re-approval.
Editing a dynamic distribution list

The Edit Dynamic Distribution List page includes a Status box which indicates if the list is active/inactive, the dates it was created and last updated and who was the last administrator to edit it.

Editing the Organisational Unit of a dynamic distribution list

To move a dynamic distribution list to a different department within the current owning organisation (e.g. switch from Leeds Teaching Hospital IT department to Leeds Teaching hospital maintenance department) you must edit the Directory properties of the distribution list. These edits will have immediate effect and will update the dynamic distribution list entry in the NHS Directory.

To move a dynamic distribution list to a new Organisational Unit:

1. Click on Edit next to Organisational Unit under Directory Properties.
Editing a dynamic distribution list

1. If appropriate, click the + box to expand the Organisational Unit list and select a new Organisational Unit and click Ok.

Note: To change the owning organisation, rather than switch the list between different departments within the same organisation, you will need to use Transfer in the Actions box. Refer to the Transfer a distribution list for more information.

When all editing is complete:

2. Click Update at the bottom of the Edit Distribution List page.

The following message will be displayed:

```
success: Update distribution list JupiterWard
```

If you receive any type of failure notification, refer to the Notifications for more information on how to address the issue.
Transferring a static or dynamic distribution list

A static or dynamic distribution list may need to be transferred from one organisation to another (e.g. if an organisation closes down and a new organisation will be taking over ownership of the distribution list). You will be able to move the distribution list from the original organisation to the new organisation as long as you have administrative rights at both organisations. If you do not have administrative rights at both organisations, contact one of your Local Administrators who has those permissions or the NHSmail National Help Desk.

To transfer a distribution list:

1. Click Admin in the navigation bar at the top of the screen and select Distribution List from the drop down menu.

2. Use the search box to find the distribution list that you wish to transfer.

   Refer to the Searching for an Entry section for more information.

   Handy Hint
   You can use the Advanced Search to filter by static or dynamic distribution lists. Refer to Using the Advanced Search for more information.

3. Click the distribution list display name to open the Edit Distribution List Page.

4. Click Transfer in the Actions box.
Transferring a static or dynamic distribution list

5 Select the New Organisation from the drop down menu and click Transfer

The following message will be displayed:

The distribution list owner will receive an email detailing that the transfer was successful

Additional Information

• The organisation’s short display name prefix on the distribution list will be updated to the new organisation
• Following a transfer, the status of the distribution list will remain enabled and will not need to be re-enabled
• There will be no changes to account members and there will be no changes to any rules for a dynamic distribution list. If there is a rule about the old organisation that is obsolete, the owner will need to edit the distribution list to remove it. Authorised senders will not be able to send to the Distribution List until these rules are edited
Deleting a static or dynamic distribution list

You should delete any static or dynamic distribution lists that are no longer required or used. Once a distribution list has been deleted, users will no longer be able to send emails to this group of contacts. You will only be able to delete static or dynamic distribution lists under your organisation and you will need the appropriate permissions to perform this action.

To delete a static or dynamic distribution list:

1. **Warning**
   Once a distribution list is deleted it cannot be recovered. Before completing the steps below, please double check you are deleting the correct list.

2. Click Admin in the navigation bar at the top of the screen and select Distribution Lists from the drop down menu.

3. Use the search box to find the distribution list you wish to delete.

   Refer to the *Searching for an Entry* section for more information.

4. Click Delete in the Actions Box.
Deleting a static or dynamic distribution list

5 Click **Confirm** to verify that you want to delete the dynamic distribution list

The following message will be displayed:

Additional Information

- You will not be able to re-use the alias for a distribution list that has been deleted. So, you must be absolutely sure that the list is no longer needed before deleting any distribution list
Approving a distribution list

Users are able to create both static and dynamic distribution lists on NHSmail. Once they have created their distribution list, an email will be sent to their organisation’s Local Administrator to approve (or reject) the list. Local Administrators must assess the suitability of the distribution list, and should query the creation with the user if they have any questions about why the list is needed.

To approve a static or dynamic distribution list:

1. Click Admin in the navigation bar at the top of the screen and select Distribution List from the drop down menu.

2. Use the search box or advanced search feature to view distribution lists with the status of pending.

3. Click on distribution list you wish to approve or reject.

The distribution list screen will open.

All the distribution lists that have been created under the organisation you have administration rights over will appear in a list format with a status of pending or active. Active distribution lists are ones that have already been approved, pending status means the lists need to be approved or rejected.

Refer to the Searching for an Entry section for more information.

Note: the list will only show distribution lists that are owned by your organisation or distribution lists waiting for approval from an LA from your organisation. Once a distribution list has been approved, if it is not owned by your organisation, it will not show up in this list.
Approving a distribution list

You should review the content of the distribution list that the user has created before choosing to Approve or Reject the list. Follow local organisation guidelines for guidance on when to approve or reject a distribution list.

To approve a distribution list:

1. Click Approve

The following message will be displayed:

If the distribution list is approved, the users that created the distribution list will receive an email notifying them that it has been approved. When the user logs back into the portal they will see that the status of the list has become active and they will be able to manage the distribution list going forward. If the list is rejected, they will receive an email notification saying that the distribution list was rejected. The user should contact their local administrator to query the rejection if necessary.

To reject a distribution list:

1. Click Reject

The following message will be displayed:
Creating a Directory contact

Within the NHSmail Portal you can create a NHS Directory entry for a contact that does not have a NHSmail account (nhs.net domain). For example an individual who is affiliated with your organisation but that works at a NHS trust where they use another email system.

Once you add a contact, he or she will become visible and searchable in the NHS Directory to all NHSmail users. The contact can also be added to distribution lists. Once you have entered the contact information you will be responsible for management of the contact information to ensure it is kept up to date. You can configure your connector to update Contact entries. Refer to the TanSync guides on the Policy and Guidance Help Page.

To create a new contact:

1. Click Admin in the navigation bar at the top of the screen and select Contacts from the drop down menu

2. Click Add at the top left of the screen and select Contact from the drop down menu

3. Enter the user’s details such as Title, First Name, Last name in the appropriate boxes

   All fields with an * are mandatory

   The contact’s display name will automatically generated

4. Type in any contact numbers, including Mobile, Telephone, Pager and Fax into the appropriate boxes
Creating a Directory contact

5 Select a user **Type** from the drop down menu

User types include: employees, contractors and external suppliers

6 Enter the **Email Address** in the appropriate textbox

**Warning**
You will not be able to add email addresses that end in nhs.net as they are already in the NHS Directory

7 Select the Contact’s **Clinical Speciality, Role** and **Work Area** from the appropriate drop down menu. You can select more than one option

8 Type in any relevant **Notes** about the contact in the Notes text box

This note will be visible to all users when they search for the contact within the Directory

**Handy Hint**
Use the notes field to let other administrators know why the contact has been added to the Directory as a Contact e.g. what company or organisation they work for
Creating a Directory contact

9. Select your **Organisation** from the drop down menu

10. If applicable, select the **Organisational Unit** that the contact is affiliated with from the expandable list

11. Click **Complete** at the bottom of the page

The following message will be displayed:

```
success: create mail contact for TAN, Jiu Yi
(IMPERIAL COLLEGE HEALTHCARE NHS TRUST)
```

---

**Additional Information**

- You can tell the difference between a Contact entry and a NHSmail user when searching the directory. Contacts entries have (Contact) following their display name and the icon next to their name is an address book.

- Contacts will not have access to the Portal to manage their own contact information, so you must ensure that you manage the contact information so that it remains up to date.
Editing a Directory contact

If the details associated with a contact are incorrect you can edit the contact’s details through the Contact Details screen. Any edits you make will have an immediate effect and will update the NHS Directory accordingly.

To edit a contact:

1. Click **Admin** in the navigation bar at the top of the screen and select **Contacts** from the drop down menu.

2. Use the search box to find the contact you wish to edit.

Refer to the **Searching for an Entry** section for more information.

**Handy Hint**

Use the advanced search feature to narrow down your search or click the Display Name tool bar to sort the list in alphabetical order.

3. Click the **Display Name** of the contact that you would like to edit.

Editing the Organisational Unit of a Directory contact

To move a contact to a different department within the current owning organisation (e.g. switch from Leeds Teaching Hospital IT department to Leeds Teaching Hospital maintenance department) you must edit the Directory properties of the contact. These edits will have immediate effect and will update the contact entry in the NHS Directory.

To edit a Directory contact Organisational Unit:

1. Click **Edit** next to Organisational Unit.
Editing a Directory contact

2 If appropriate, click the + box to expand the Organisational Unit list and select a new Organisational Unit and click Ok

Note: If contact information needs to be transferred over to a new organisation (e.g. a organisation closed down, and the contact will be associated with the new organisation), you will need to refer to Transferring a contact for information on how to move their details over to the new organisation

Editing the clinical speciality, clinical role, work area of a Directory contact

1 Click Edit next to Clinical Speciality/ Clinical Role/ Work Area under Directory Properties and select a new speciality/role/area from the drop down menu

You can add more than one clinical speciality, clinical role and work area

Warning
If a user is moving away from a clinical speciality, role or work area, you will need to deselect the old fields before selecting the new speciality, role or work area
Editing a Directory contact

When all editing is complete:

2. Click **Update** at the bottom of the page

The following message will be displayed:

![success message]

If you receive any type of failure notification, refer to **Notifications** for more information on how to address the issue

**Additional Information**

- When a Directory Contact is edited, the changes are automatically updated on the NHS Directory and will apply to any distribution lists that the contact may be associated with
Transferring a Directory contact

If an organisation closes down and a new organisation takes over ownership of the contact, you can move the contact from the original organisation to the new organisation as long as you have administrative rights at both organisations. All of the details associated the contact will move over to the new organisation and their entry in the NHS Directory will immediately update.

To transfer a contact:

1. Click Admin in the navigation bar at the top of the screen and select Contacts from the drop down menu.

2. Use the search box to find the contact that you wish to transfer.

Refer to the Searching for an Entry section for more information.

Handy Hint
Use the advanced search feature to narrow down your search or click the Display Name tool bar to sort the list in alphabetical order.

3. Click the contact’s Display Name to open the Contact Details Page.

4. Click Transfer in the Actions box.

5. Select the New Organisation from the drop down menu and click Transfer.
Transferring a Directory contact

The following message will be displayed:

\[\text{success: Transfer MailContact successful for frankw@gmail.com}\]

Following the transfer, the contact’s organisation will be updated in the Contact Details screen.
Deleting a Directory contact

When a contact is no longer associated to your organisation, you must delete their account. This will remove their details from the NHS Directory as well as from any distribution lists they had been added to. The details of a contact are not restorable after deletion, you would instead have to re-create the contact entry. If you need to transfer a contact to a new organisation, refer to the Transferring a Directory Contact section for more information, you will not need to follow the Leaver/Joiner process for a Directory contact.

To delete a contact:

1. **Warning**
   Once a contact is deleted it cannot be recovered. Please ensure you have selected the correct contact before following the steps below.

2. Click **Admin** in the navigation bar at the top of the screen and select **Contacts** from the drop down menu.

3. Use the search box to find the contact that you wish to delete.

   Refer to the *Searching for an Entry* section for more information.

4. Click the **Contact’s Name** to open the Edit Contact Page.

5. Click the **Delete button** in the **Actions box**.

6. Click **Confirm** to delete the contact.
Deleting a Directory contact

Additional Information

• You will be able to re-create the contact if the contact becomes associated with your organisation again in future/it was deleted by accident
Converting a Directory contact to a User

If a contact associated to your organisation joins it, you can convert the contact into a user. The conversion process lifts all contact information about the individual and pre-populates it onto the create a user page. Once the process is complete the contact will be set up with a user account. The original contact entry in the directory will not be deleted.

To convert a contact to user:

1. Click Admin in the navigation bar at the top of the screen and select Contacts from the drop down menu.

2. Use the search box to find the contact that you wish to convert to user. Refer to the Searching for an Entry section for more information.

3. Click the contact’s Display Name to open the Edit Contact page.

4. Click the Convert to user button in the Actions box.

5. Click Confirm to confirm the conversion.
## Converting a Directory contact to a User

### 6. Complete the fields on the create user page.

Refer to the *Creating a User Account* section for more information on how to complete the fields on this page.

Note: you must select an email address as this is not generated automatically.

### 7. Click **Create** to convert contact to user.
Auditing actions

There is a built-in audit function which tracks any actions on the Portal that a Local Administrator or a User has performed. The audit report will tell you the time that the action was performed, who performed it, the target object (e.g., the name of the distribution list or user account), the target organisation, the object type and the action. You may need to use this feature for information governance purposes should you need to track an unexpected behaviour (e.g., user accounts being deleted unexpectedly).

To use the audit:

1. Click **Reports** in the navigation bar at the top of the screen and select **Audit** from the drop-down menu.

2. Select the target **organisation** from the drop-down menu.

   **This field is mandatory.**

The information you enter in all the other fields depends on what type of audit you want to run. For example, to run an audit based on a particular user or administrator, type their email address into the User Performing Action box, select a start and end time/date to see all activity for that period.

You can further refine the reports by choosing the action that was performed (Create, Update, Delete or Other) from Actions. Or selecting what the action was performed on (User Mailbox, Shared Mailbox, Distribution List, Contact or Organisation) from Object Types.

Leave the User Performing Action field blank to run an audit on all users.

If you want to see what actions have been performed on a specific user account, type their email address in Target Object and then select the Actions or Object Types if required.

**Handy Hint**

Entering in more information into the audit search will increase the likelihood that you locate the action you wish to track. You can select more than one object type / action.
Auditing actions

3 Click Search

4 Click on the audited action to open the View Audit Record page to view the Detailed Message Content

Note: the detailed message content is intended for a technical audience that can read log files
**Auditing actions**

If you need to save the results of an audit report, you can export the results to a CSV file. You may want to do this if the audit report needs to be used for information governance purposes.

To export an audit report:

1. Click on **Export** at the top right of the page.

The audit report will begin to download and will show when complete in your tool bar at the bottom of the page (this may differ depending on your browser version).
Admin Reports

Admin reports allow you to produce real time reports on users in your organisation. There are six types of reports available:

- **Mailbox Reports** – Lists the details of all the users within your organisation, including the information visible on the NHSmail Portal Admin pages as well as the user’s Local ID
- **Contact Reports** – Lists the details of all the contacts within your organisation, including the information visible on the NHSmail Portal Admin pages as well as the contact’s Local ID
- **Distribution List Reports** – Lists the details of all the distribution lists set up by your organisation including the details visible on the NHSmail Portal Admin pages as well as the distribution list’s Local ID
- **Top-up Reports** – Lists the current and past subscriptions held by all users within your organisation
- **Possible Duplicate User Reports** – Lists possible duplicate users where there is more than one person with the same first and last name in an organisation and the status is active
- **Organisation Admin Reports** – Lists all administrators for the selected organisation

To generate an Admin Report:

1. Click **Reports** in the navigation bar at the top of the screen and select **Admin Reports** from the drop down menu

2. Select the **target organisation** and **reports** from the drop down menus

   If you do not select an organisation, the default “All my organisations” is selected

3. Click **Generate Report**

   The Admin Report will begin to download and will show when complete in your tool bar at the bottom of the page (this may differ depending on your browser version)
Viewing and editing organisation attributes

Local administrators can view and edit information about the organisation they have administrator rights over within the Portal. You will be able to restructure the Organisational Units to accommodate for any changes (e.g. a new department opening or closing down). You will also manage the organisation’s registration limits through the organisation management screen. This can be managed manually on a organisation by organisation basis or in bulk through a CSV file upload.

Viewing Organisations

1. Click Admin in the navigation bar at the top of the screen and select Organisations from the drop down menu.

The organisation list will open and you will be able to view the organisation(s) that you have administrative rights over.

2. Click on the organisation name to open the Organisation page.

The Manage Organisation screen will open.
Viewing and editing organisation attributes

From the Manage Organisation screen, you will be able to view the details of parent organisations and any Organisational Units that sit under the parent organisation (for example; the departments/wards that sit within a large acute hospital). Most information about the parent organisation is not editable. Only global administrators can make edits to parent organisations. They can edit organisation short name, enable secondary email addresses and edit registration limits.

Editing an organisation’s shortname

1. Type the organisation’s new shortname into the appropriate text box
# Organisational attributes

## Viewing and editing organisation attributes

### Enabling an organisation for secondary email address

1. Click the toggle to switch from **OFF** to **ON**

Enabling secondary email addresses for an organisation will mean that all users that sit under the organisation will have two email aliases 1) `firstname.lastname@nhs.net` 2) `firstname.lastname@shortorg.nhs.net`. A user will be able to receive emails using both aliases but will only be able to send using the `firstname.lastname@nhs.net` email address. Please note that this is only available if your organisation has sub-domain branding enabled.

For information on how to view a list of a user email aliases, refer to *Editing a User*.

### Setting organisation registration limits

Registration limits refer to the number of mailboxes that an organisation can register over the period of a month. This number will be visible when creating accounts.

1. Click on the **Limits** tab at the right of the Organisation tab

Dependant on local organisation policy, registration limits can either be set to a default level or a unique figure for the organisation.
Viewing and editing organisation attributes

To set a default registration limit:

2. Click the toggle to switch from OFF to ON

![Default limit OFF and ON]

This will set the registration limit to 200 mailboxes per month

To set a unique registration limit:

3. Enter the number of registrations into the New Mailboxes Per Month text box

![New Mailboxes Per Month text box]

When you have completed any edits:

4. Click Save Changes at the bottom of the page

✅ success: Edit organisation request successful
Viewing and editing organisation attributes

CSV Upload of organisations registration limits

If you need to set the registration limit for a large group of organisations in bulk, you can do this by uploading a CSV (comma separated values) file containing the registration limit. In order to upload the CSV file successfully, you must first export your organisation(s) CSV file. Refer to Organisation Export for more information. You should then edit the registration limits within the file and then re-upload to the portal. If you wish to view the correct format for the CSV file, you can download a sample file from the Upload Organisation Screen by clicking on the sample file hyperlink in the instructions at the top of the page.

The CSV upload process follows a two step process; 1) Validate CSV file 2) Upload organisation. This approach is an alternative to the traditional connector management approach and can be used in parallel or as a new method of organisation bulk upload.

1. Click **CSV Upload** at the top left of the screen

2. Click **Browse**

3. When you have found the CSV file, click on it and click **Open**
Viewing and editing organisation attributes

In the file validation results, you will be able to check whether the file has successfully validated or not. If there are errors in the validation, you will need to edit the CSV file and then re-run the validation process (steps 1-4). When the validation is successful:

5. Click Upload

The following message will be displayed:

The following message will be displayed:

Viewing and editing Organisational Units

After opening the Manage organisation screen

1. If appropriate, click the + in the expandable list to the left of the screen to view Organisational Units. Click on the name of the Organisational Unit for more information.
Viewing and editing organisation attributes

Information about the Organisational Unit e.g. address, telephone number, website is viewable on the right hand side of the screen

2 Enter in the appropriate box any information that requires changing

When all editing is complete:

3 Click Save Changes at the bottom of the page

Adding Organisational Units

Follow steps 1-2 on page 94 to open the organisation screen and select the organisation that you wish to add a new Organisational Unit to

1 Select the parent organisation’s name in the list and then click Add
Viewing and editing organisation attributes

2. **Edit the new Organisational Unit information by entering information in the appropriate text boxes**

When all editing is complete:

3. **Click Save Changes at the bottom of the page**

The following message will be displayed:

- Success: Edit organisation request successful
Viewing and editing organisation attributes

Deleting Organisational Units

After opening the organisation screen

1. If appropriate, click the + and – in the expandable list to the right of the screen to view Organisational Units. Click on the name of the Organisational Unit that you wish to delete

2. Click Delete

The Organisational Unit that you have selected to delete will turn red. If the wrong Organisational Unit is selected, click cancel at the bottom of the page

To confirm the delete:

3. Click Save Changes at the bottom of the page

The following message will be displayed:
Notifications

Viewing notifications

You can check the progress of any actions you have started, e.g. a large CSV upload, by viewing the Notifications page. It will show the status of the action (incomplete/complete), the total number of actions completed and the time that that action was completed.

To open the Notification Page:

1. Click the notification icon at the top left of the screen.

The notification page will open and you will see all activity that you have performed (either in progress, complete, or incomplete).

Handy Hint

The number to the top right of the notification icon is an indicator of the number of actions that you are running.

Deleting notifications

Notifications are not automatically deleted. You will need to check regularly for completed notifications that you do not need to track anymore and delete them yourself.

To delete an old notification:

1. Select the tick box to the left of the notification and click Delete.
Notifications

Success and failure notifications

Following the completion of any actions, you will see a Notification in the top right of the screen:

Below is an example of a success notification:

Below is an example of a failure notification:

If you receive a failure notification, it could be due to a technical issue or an issue with permissions. You should contact your Local Primary Administrator or the Helpdesk if these failure notifications persist.