

NHSmail Portal User Guide



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Using Bookmarks

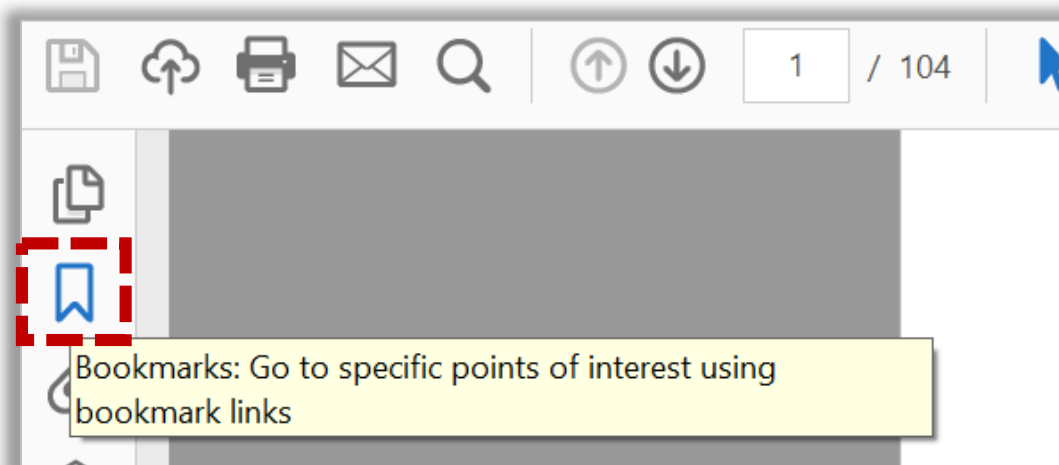
Using this guide

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:

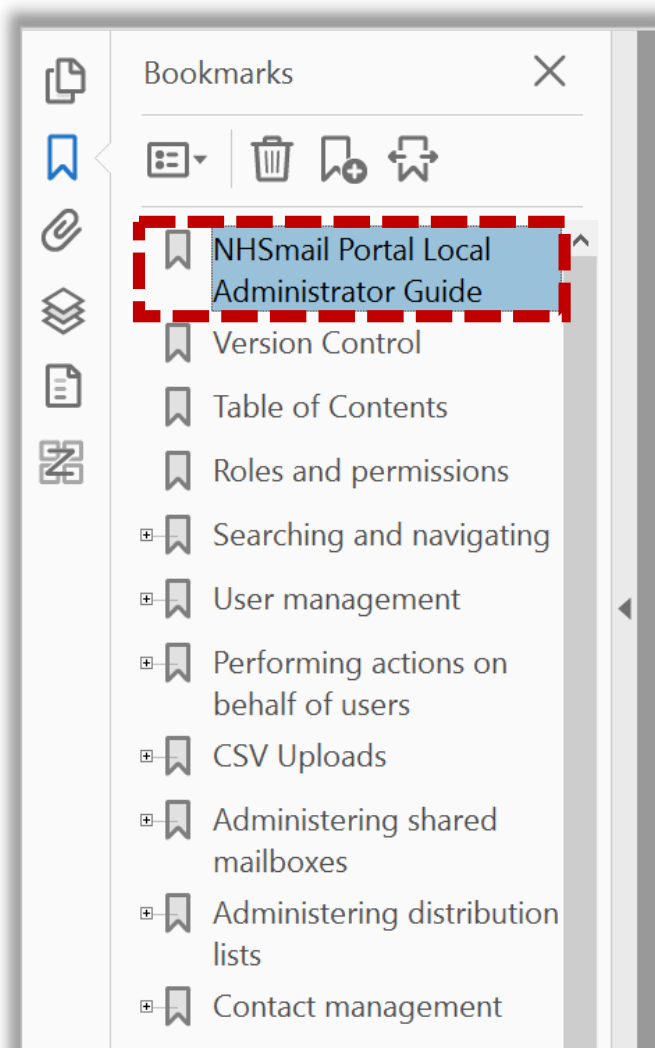
1

Click the Bookmark icon in the toolbar on the left side of the screen



2

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

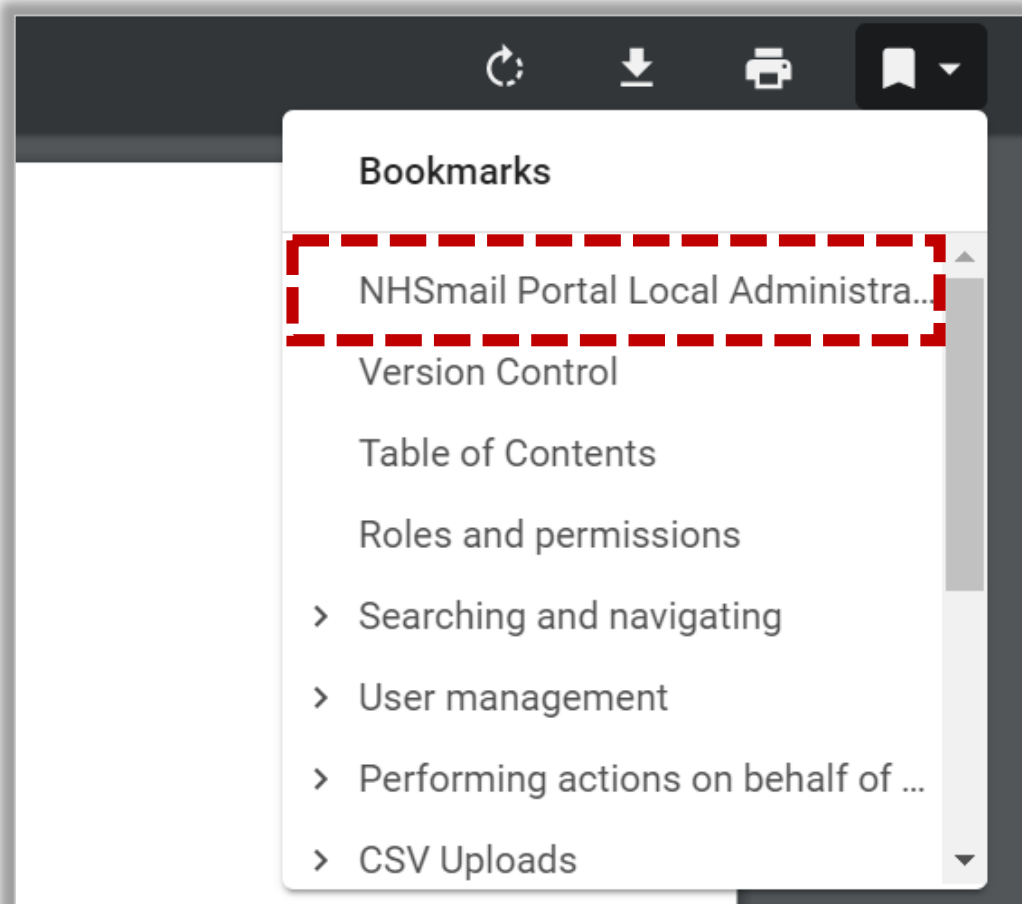


To use Bookmarks in a guide that you are viewing through a PDF web viewer:

- 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

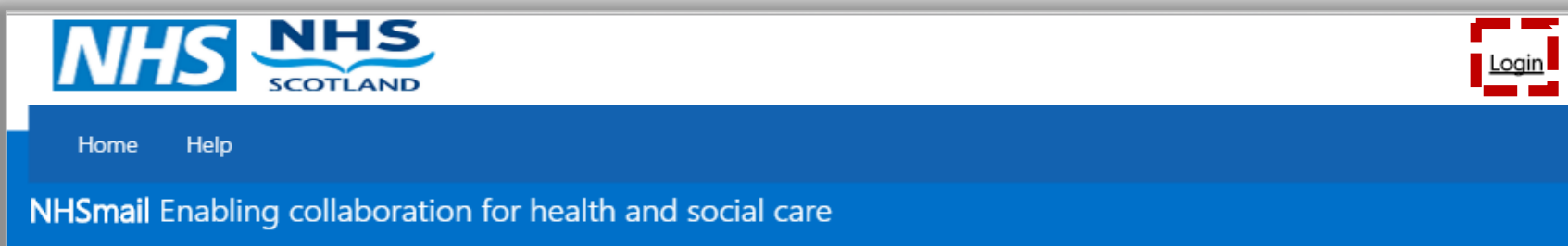


Logging in at www.nhs.net and navigating around the Portal

You can access the NHSmail Portal by going to www.nhs.net. Here you will have access to self-service features to manage your account, such as updating your profile, resetting your password and setting your security questions. You can also access the NHS Directory and support pages where you can view training and guidance materials. Note: If you are logging into the service for the first time then you should refer to the [Getting Started Guide](#)

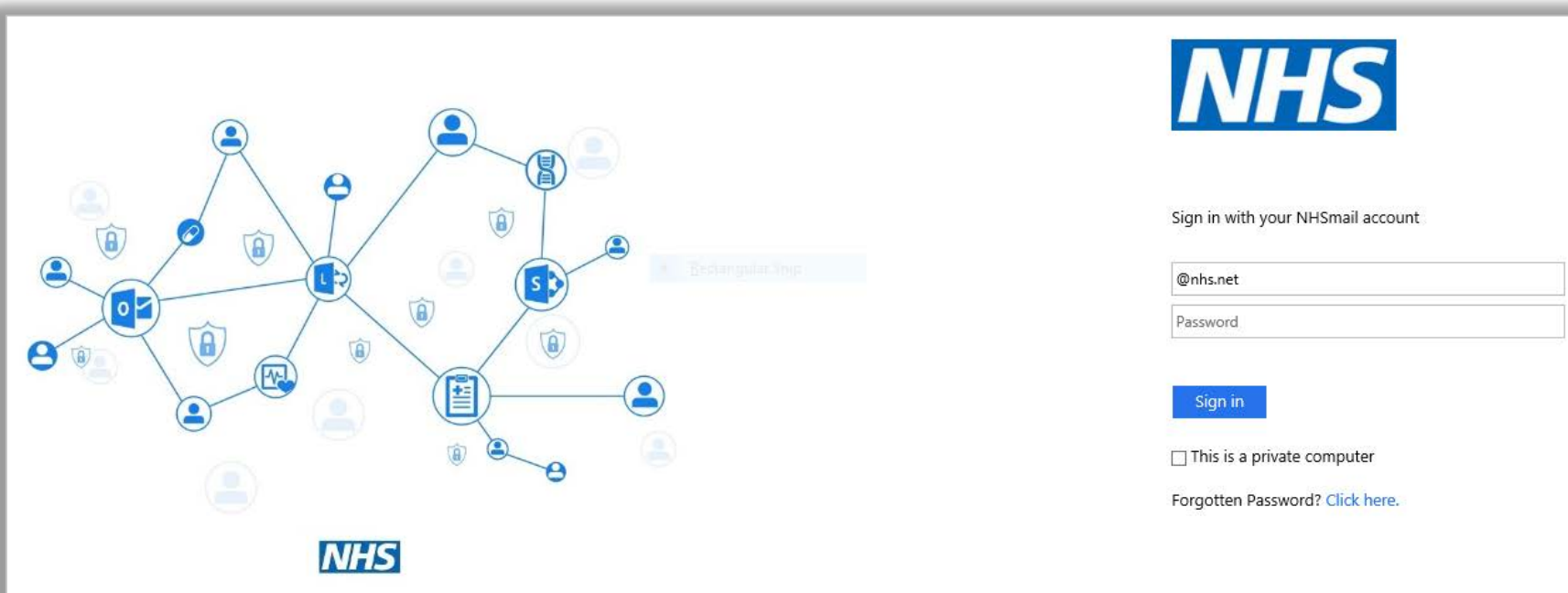
1 Enter www.nhs.net into your browser window

2 Click **Login** at the top right of the page



3 Enter your **email address** and **password** into the appropriate text boxes and click **Sign In**

You can just type in the first part of your email address (firstname.lastname) as the @nhs.net part of your email address will auto-populate.

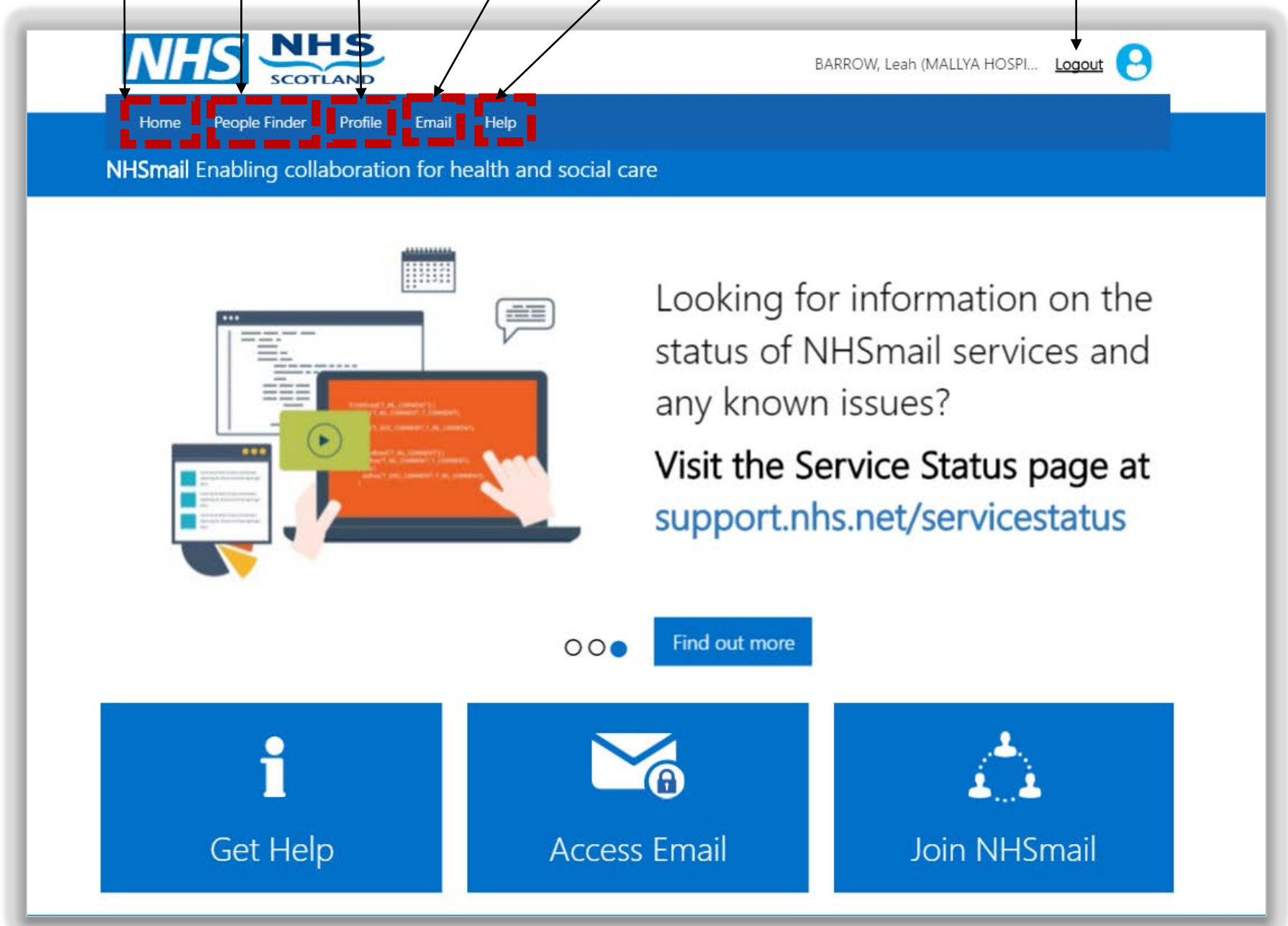
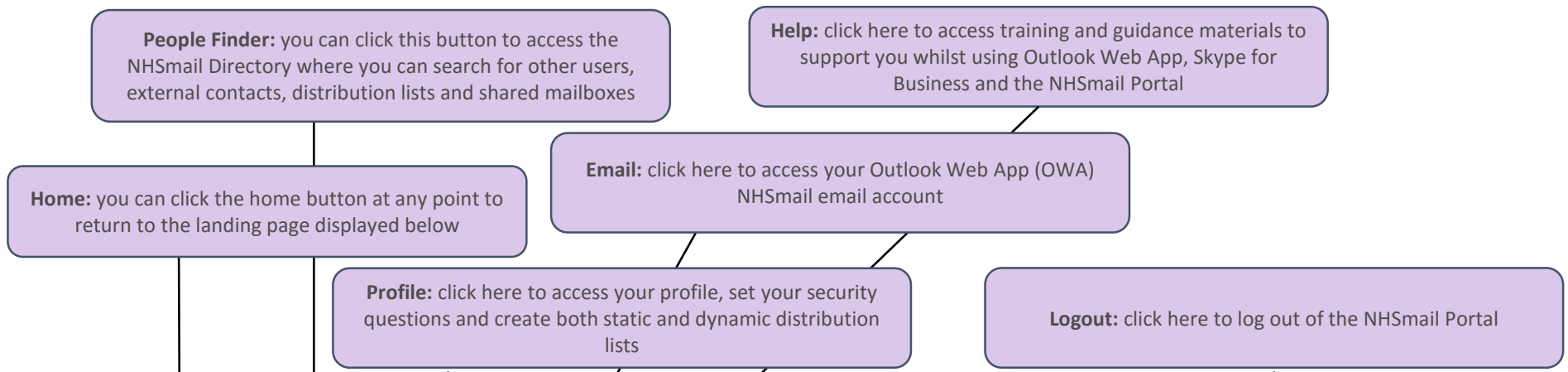


If you have forgotten your password, refer to [Resetting your password](#) for more information

If you entered your username and password correctly, you will be taken to the NHSmail portal

Logging in at www.nhs.net and navigating around the Portal

Following logging in at www.nhs.net, you will see the landing page below. The Portal is intuitively designed and easy to navigate around. By clicking on each of the buttons on the tool bar at the top, you will be directed to different sections of the Portal. Click the Home button at any point to return to this landing page



Updating Profile Details

Your user profile contains contact information that is added from the information provided when your NHSmail account is created. This information is displayed in the NHS Directory. You can edit your personal contact details, e.g. if your mobile number changes or if you want to add personal description for yourself. Any updates you make to your profile will be updated in the Directory instantly. However, this information may be over-written if your organisation is connector managed (by a centrally-managed data source). If this is the case, please notify your Local Administrator if any of your key contact details (e.g. mobile number) change.

To update your personal details:

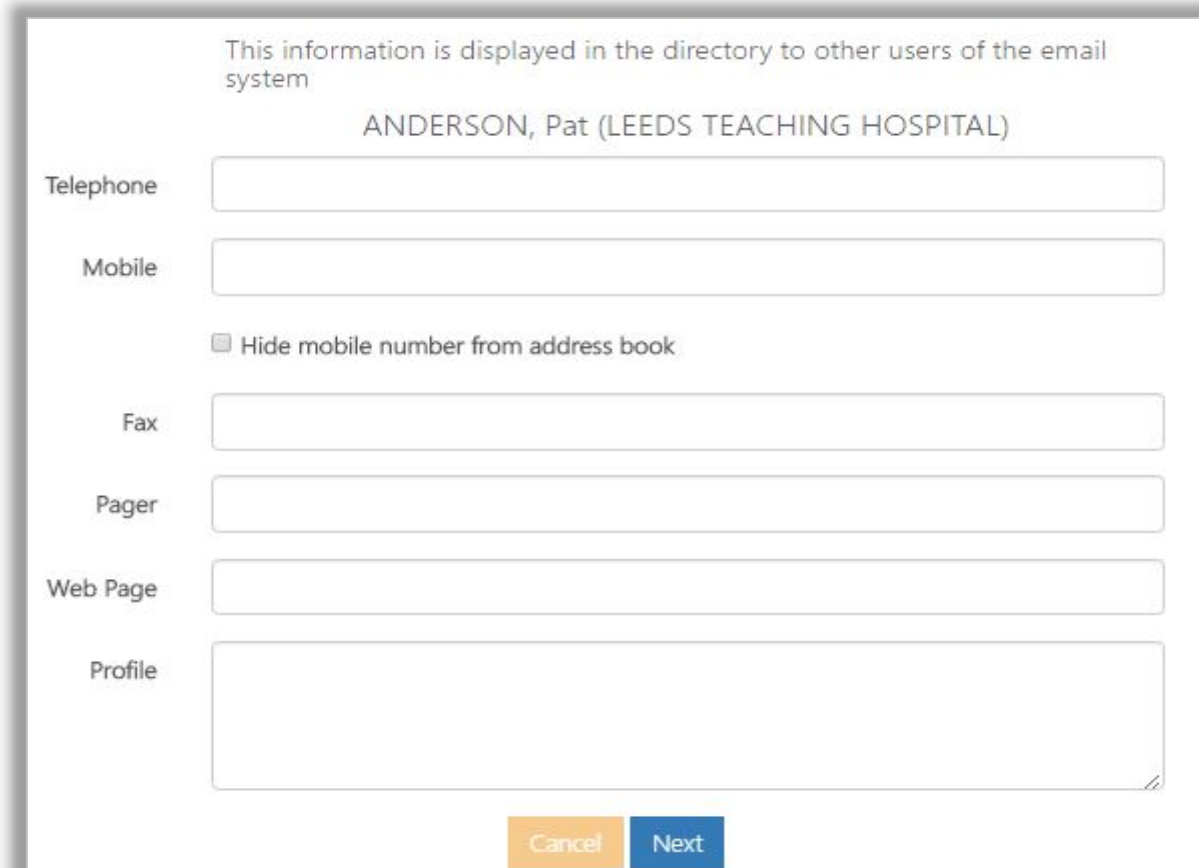
- 1 Click **Profile** in the navigation bar at the top of the screen



- 2 Click on the **My Profile** tab

- 3 Enter your new **Telephone, Mobile, Fax or Pager** number

The mobile number that you set here will be the number used for authentication purposes in self-service password resets. You should only use a work mobile that is used for your sole use, and not shared, or a personal mobile device for this purpose. If you wish to hide a personal mobile number from being displayed in the NHS Directory click the 'Hide mobile number from address book' option.

A screenshot of the profile update form. At the top, it says 'This information is displayed in the directory to other users of the email system'. Below that, the name 'ANDERSON, Pat (LEEDS TEACHING HOSPITAL)' is displayed. The form contains several input fields: 'Telephone', 'Mobile', 'Fax', 'Pager', 'Web Page', and 'Profile'. There is also a checkbox labeled 'Hide mobile number from address book'. At the bottom of the form, there are two buttons: 'Cancel' and 'Next'.

4 Enter your **Web Page** if applicable

This could be your own personal webpage or your organisation's website

5 Type a brief description of yourself under **Profile**

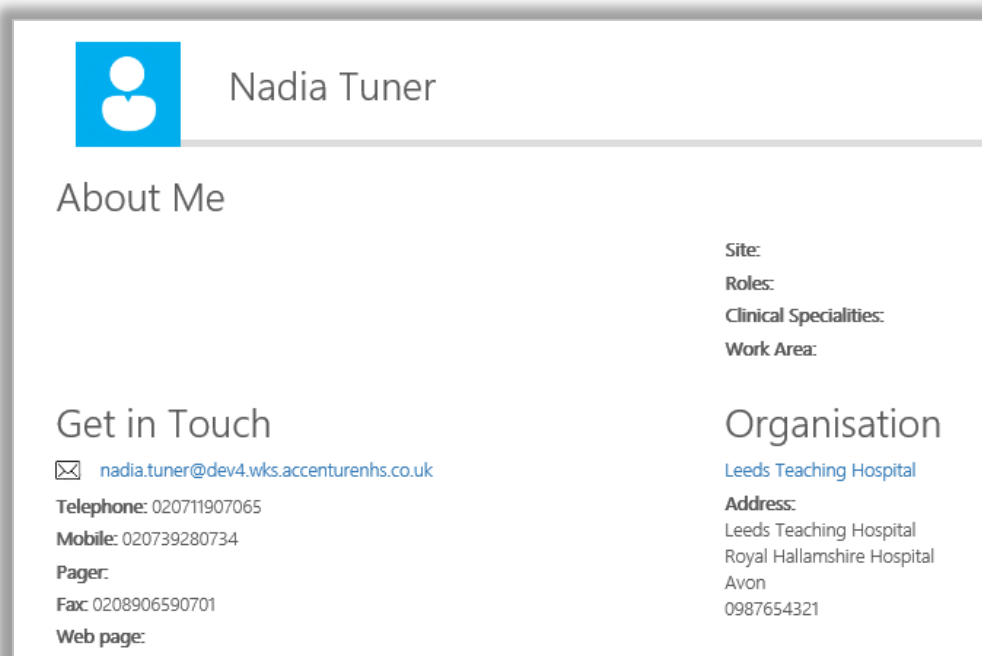
This will show as an **About Me** section when a user searches for your entry in the Directory. The character limit within this section is 1000

6 Click **Next** at the bottom of the page

You will then click through to the security questions page, where you will have the option to update your questions and answers if necessary. Refer to the [Updating your security questions](#) section for more information

7 Click **Save** at the bottom of the page

The screenshot below demonstrates how other users will see your profile information when they search for your details in the Directory



Additional Information

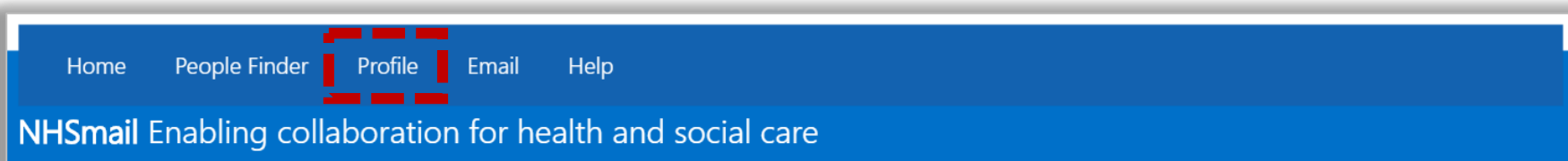
- **Personal Detail Requirements (telephone, mobile, pager fax)**
 - Maximum length is 20 characters, including 8 to 13 digits, and characters +- ()
- **Profile Requirements**
 - Maximum length is 1000 characters
- If your organisation is Connector (centrally managed data source) managed, be mindful that the connector source will also need to be updated to ensure that any new profile information is not over-written by old details stored within the connector
- If you would like to update your profile picture this is changed through Outlook Web App. More information on this can be found in the Outlook Web App User Guide under [Adding and deleting a photo on your profile](#).

Creating security questions and answers

As a user of NHSmail, you are required to set 3 security questions and answers through the Portal. The answers to these questions will then be used to check your identity, for example, if you need to contact your Local Administrator (LA) due to an account lock out or if you wish to use the self-service password reset. You will never be asked for the whole answer to your security question, only individual characters from it. You should never share the questions or answers with anyone as this will compromise the security of your NHSmail account

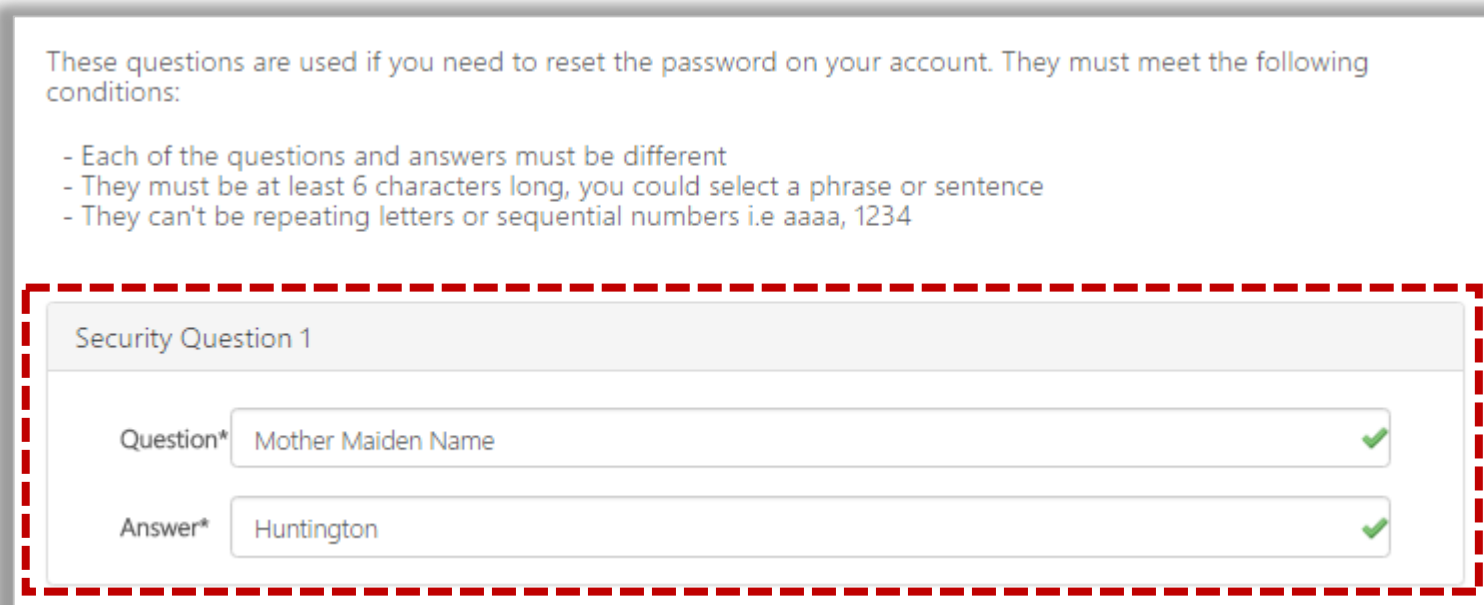
To create security questions and answers:

1 Click **Profile** in the navigation bar at the top of the screen



2 Select the **Security Questions** tab at the top of the screen

3 Type a question of your choice into the **Question** textbox and type the correct answer into the **Answer** textbox under **Security Question 1**

A screenshot of the 'Security Question 1' form. The form is titled 'Security Question 1' and contains two textboxes. The first textbox is labeled 'Question*' and contains the text 'Mother Maiden Name'. The second textbox is labeled 'Answer*' and contains the text 'Huntington'. Both textboxes have a green checkmark to their right, indicating that the input is valid. The form is enclosed in a red dashed border.

Your security questions and answers must satisfy the following criteria:

- Each of the questions/answers must be different
- Each question/answer must be at least 6 characters long
- You cannot use repeating numbers or letters in a question/answer (eg. 111 or aaa)
- A space will count as a character

Examples of security questions could be: your mother's maiden name, the model of your first car or the name of your first pet. A green tick will show to the right of the question/ answer when it fulfils the requirements

4

Repeat the same process for **Security Question 2** and **Security Question 3**

5

Click **Save** at the bottom of the page



Warning

Never share the full questions or the answers of your security questions with anyone. You will only be asked for specific characters by your Local Administrator or the helpdesk



Additional Information

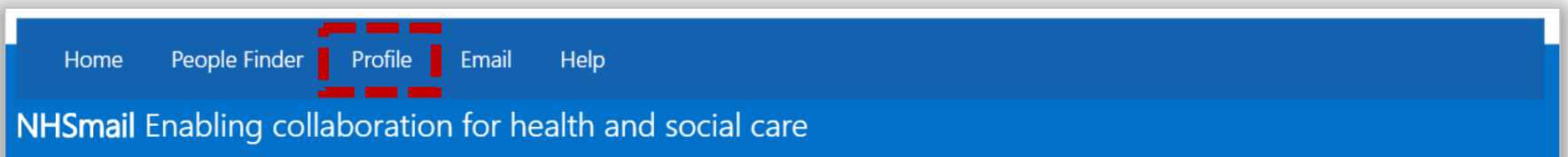
- If you forget the answers to your security questions you should contact your Local Administrator to find out how you can authenticate yourself
- Once you are re-authenticated, you will need to reset your security questions. Refer to the [Updating Security Questions](#) for more information on how to do this

Updating security questions

You will need to use your security questions and answers when resetting your password for both self-service password reset or when contacting your Local Administrator. You can update your security questions at any time through the Portal. You should do this if the answers to the questions change, you think someone may know the answers to your questions or if you are having trouble remembering the answers to your current questions

To update your security questions and answers:

- 1 Click **Profile** in the navigation bar at the top of the screen



- 2 Select the **Security Questions** tab

- 3 Edit any question or answer you want by clicking in the appropriate text box and typing the new text

These questions are used if you need to reset the password on your account. They must meet the following conditions:

- Each of the questions and answers must be different
- They must be at least 6 characters long, you could select a phrase or sentence
- They can't be repeating letters or sequential numbers i.e aaaa, 1234

Security Question 1

Question* ✓

Answer* ✓

- 4 Click **Save** at the bottom of the page

Refer to the *Creating Security Questions Quick Reference Guide* for more information about choosing appropriate security questions and answers



Warning

Never share the questions or the answers of your security questions with anyone. You will only be asked for specific characters by your Local Administrator or the helpdesk

Self-service password reset

If you have forgotten your password you will need to use the self-service password reset feature within the Portal over both an Internet and a N3 connection. To use this, you must know the answers to your security questions and you must have a mobile number set within the profile section of your account (note: you must have access to this mobile). If you do not know the answers to your security questions, or you do not have a mobile phone number associated with your account, you will need to contact your Local Administrator to reset your password. Note: you are able to hide your mobile number so that it is not searchable within the NHS Directory – refer to the [Updating Your Profile](#) section for more information.

To use the self-service password reset:

1 Navigate to www.nhs.net

2 Click on **Forgot your password?**



3 Type your full email address and click **Next**



Warning

If you do not have a mobile phone associated with your account, you will see the following error message “No phone number found. Please contact your Local Administrator”

4

Enter the appropriate characters of the answers to your security questions into the corresponding box and click **Next**

If you answer these questions correctly a text message will be sent to the mobile phone number registered against your account. If you don't remember the answers to these questions or your phone number is not set correctly you will need to contact your local organisation administrator to reset your password.

What is your mother's maiden name?
From your answer text, please enter character no: 2

From your answer text, please enter character no: 3

What is your favourite white rabbit called?
From your answer text, please enter character no: 2

From your answer text, please enter character no: 3

Note: The character position counts blank spaces in your answer

next



Warning

You will never be asked to enter the full answer to your security questions

Once you have correctly answered the security questions, a text message with a new temporary password will be sent to the mobile number associated with your account

If you do not have a mobile number associated with your account, or you have forgotten the answers to your security questions you must contact your Local Administrator

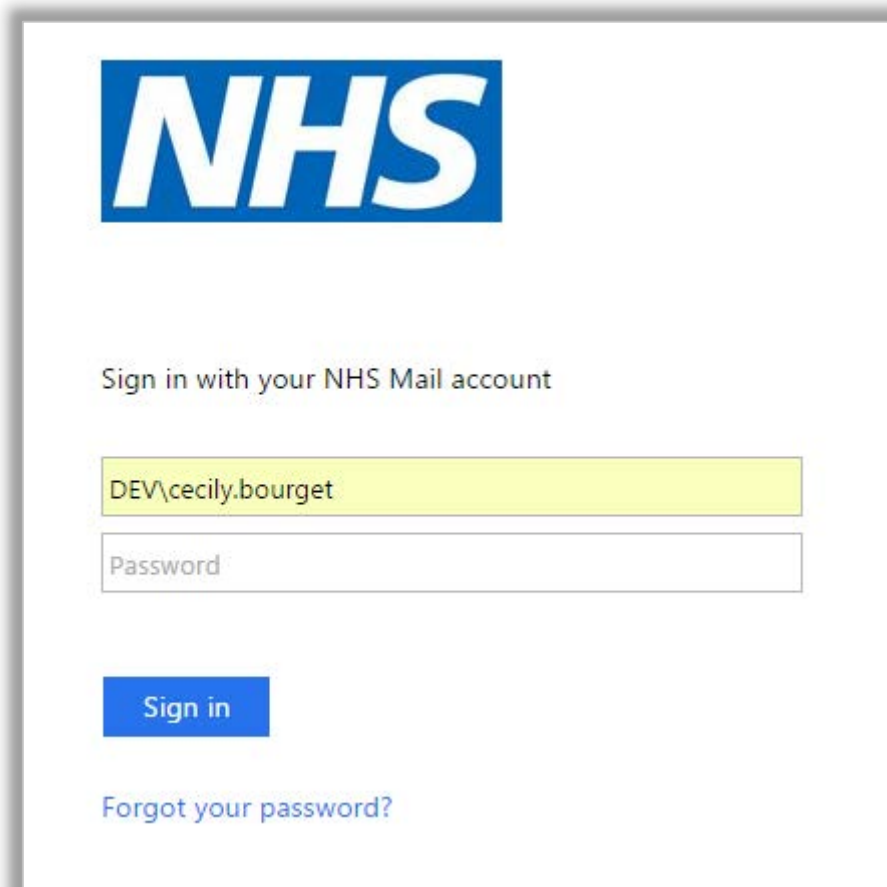
5

Check your mobile to get the details of your temporary password

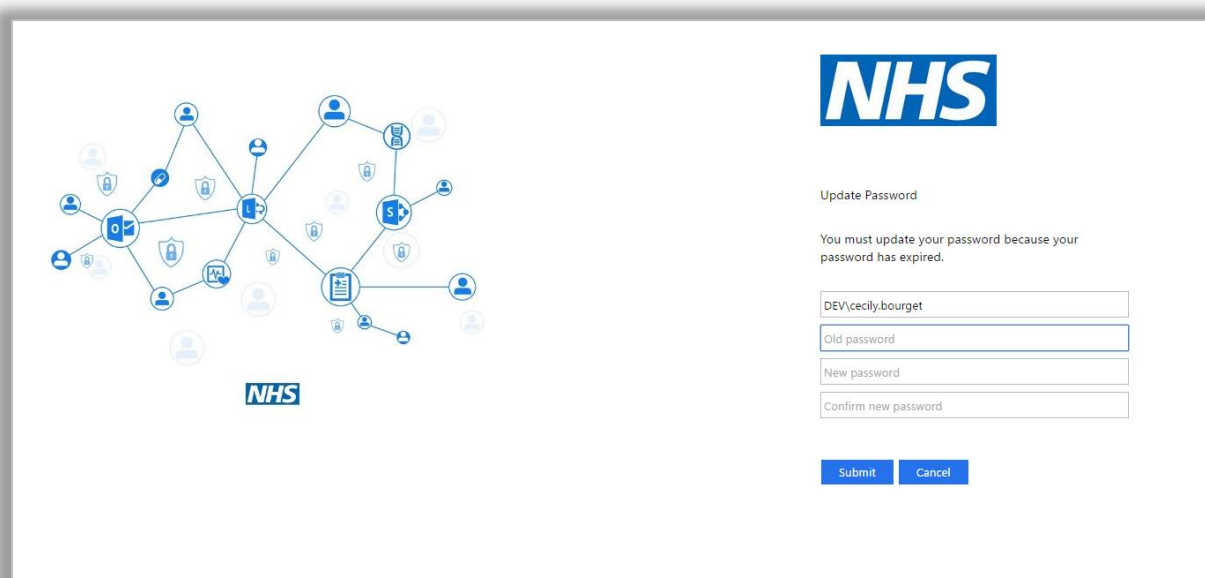


6 Go to www.nhs.net

7 Type your **email address** and your **temporary password**



Once you log in with your temporary password, you will be prompted to reset your password



Additional Information

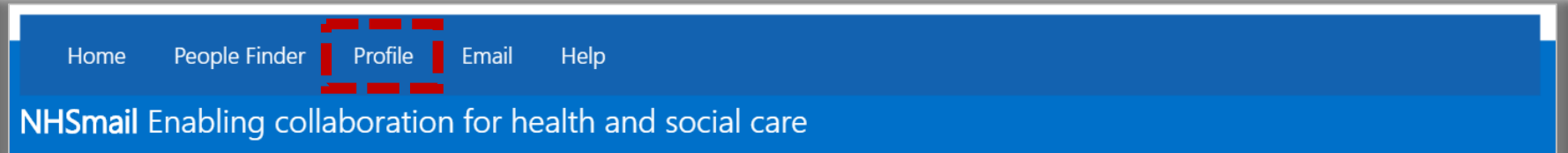
- You cannot use self-service password reset if you have already locked your account (i.e. incorrectly put in your password three times). You will need to contact your Local Administrator to unlock the account before being able to reset your password

Changing your password

To keep your account secure you will need to change your password every 90 days. You will be reminded to change your password via email 10, 7, 5, 2 and 1 day(s) before it expires. Remember, you must change your password immediately if you think someone else knows what it is. If your password expires, you will need to contact your Local Administrator. Following a password change, you should ensure to update your new password on all devices e.g. mobile to avoid future lock outs

To change your password:

- 1 Click **Profile** in the navigation bar at the top of the screen



- 2 Click **Change Password** at the top right of the screen



A new window will open within your browser

- 3 Enter your **email address**, your **old password**. You will need to re-enter your **new password** twice in the fields provided

A screenshot of the NHS 'Update Password' form. The form is white with the NHS logo at the top. Below the logo, the text 'Update Password' is displayed. There are four input fields: 'Userid or Email Address', 'Old password', 'New password', and 'Confirm new password'. The entire form area is enclosed in a red dashed rectangular box. At the bottom of the form, there are two buttons: 'Submit' and 'Cancel'.

Refer to the Additional Information box in this section for information on password requirements

4

Click **Submit**

When your password has been updated you will see the following message



5

Click the **cross** at the top right of the window to close the window

You will need re-open a new browser, navigate to www.nhs.net and use your new password when you next log into the portal. Remember to update this new password on all additional devices e.g. mobile to avoid future lock outs



Additional Information

Password Requirements:

- Password must NOT include your username (pre-fix of your email address)
- It must contain a mix of three out of the following four character types:
 - uppercase letters (A-Z)
 - lowercase letters (a-z)
 - numbers (0-9)
 - symbols (!"£\$%^&*)
- It must be 8 or more characters long
- It cannot be any of your four previous passwords
- Spaces or commas cannot be used

Password Expiry Notifications

- You will be reminded via email 10, 7, 5, 2 and 1 day(s) before your password expires to change your password. If you do not change your password you will be locked out of your account and will need to contact your Local Administrator to get your account re-enabled.

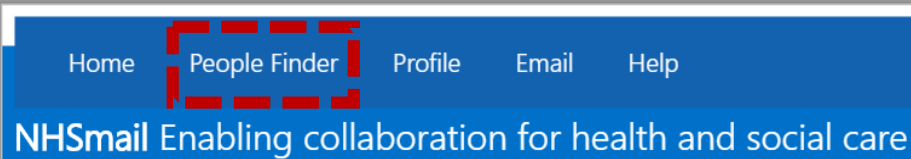
Self-Service Password Reset

- If you have forgotten your password, you can reset it by using the self-service password reset feature. You will need to know the answers to your security questions and have registered your mobile number on the portal. Refer to the [Self-service Password Reset](#) for more information.

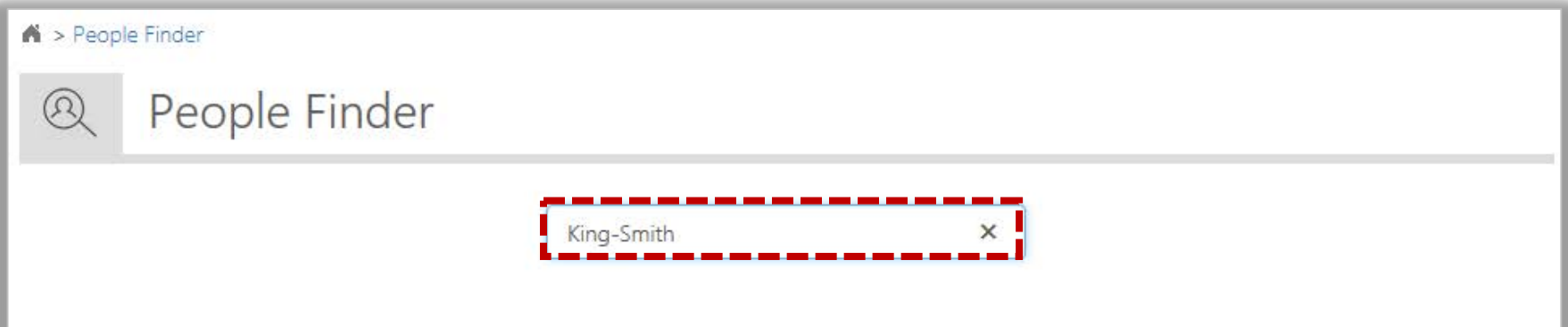
You can use the NHS Directory to search for the details (email, telephone number, pager, organisation details) of other colleagues who use NHSmail. You will also be able to search for shared mailboxes, distribution lists and Directory contacts. You may, for example, want to search the NHS Directory if you are looking for email or telephone details of a specialist in another hospital for an onward referral

To search for an entry within the NHS directory:

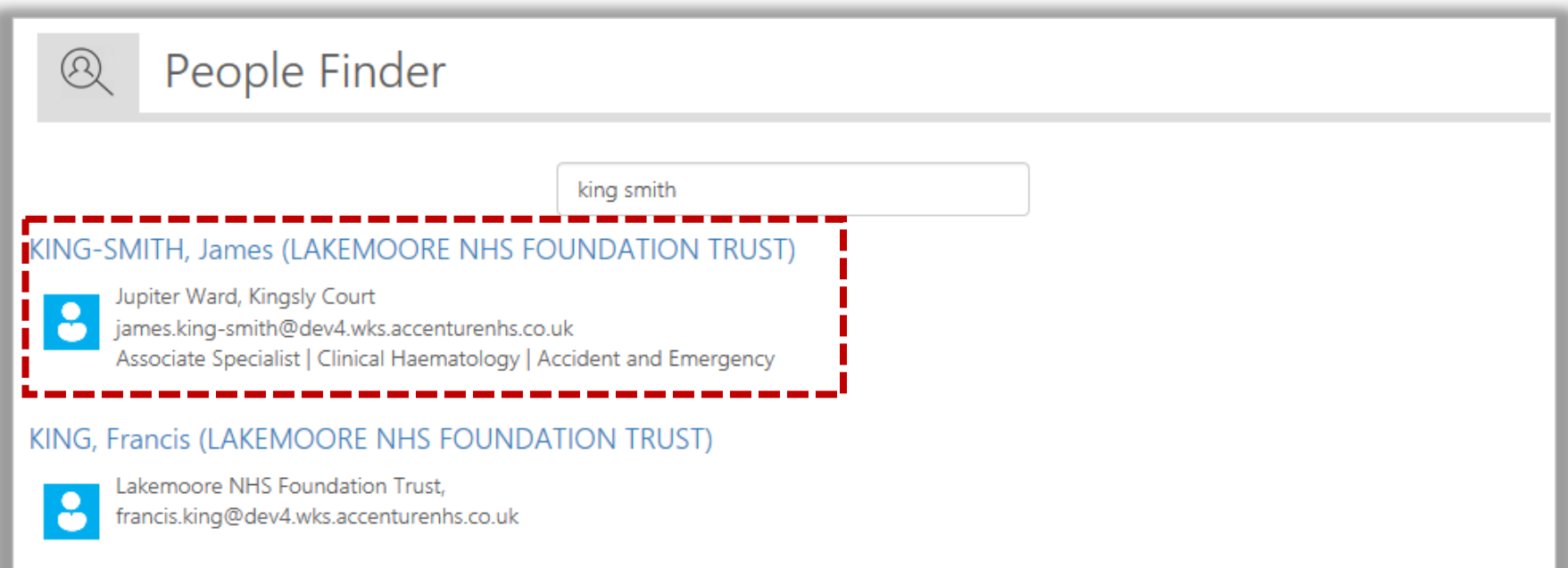
- 1 Click **People Finder** in the navigation bar at the top of the screen



- 2 Enter your search criteria in to the **search box** and press **Enter**



- 3 Click on the account name to view further information



The search will display all the results that match your search criteria

After clicking on the account name, you will see the following information



 KING-SMITH, James (LAKEMOORE NHS FOUNDATION TRUST)

About Me

My name is James King- Smith and I am a Local Administrator at Kingsly Court Community Hospital. I have worked for the NHS for 7 years.

Site:
Roles:
Clinical Specialities:
Work Area:

Get in Touch

✉ james.king-smith@dev4.wks.accenturenhs.co.uk
Telephone: 07827283718
Mobile: 07827283718
Pager:
Fax: 07827283717
Web page: <http://www.lakemoorenhstrust.com/>

Organisation

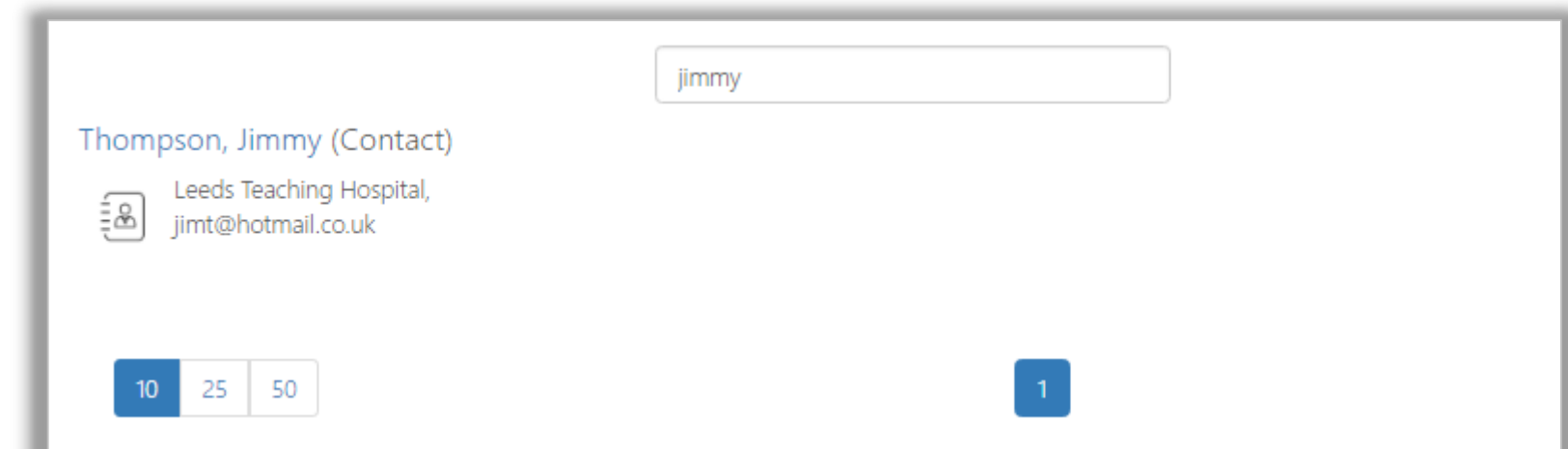
Lakemoore NHS Foundation Trust
Address:
Lakemoore NHS Foundation Trust
Lakemoore NHS Foundation Trust
Greater London
0987654321




Handy Hint

You should use the NHS Directory to ensure you are contacting the correct person by looking at their Organisation. This is important when two users have the same name

When searching the NHS Directory for a contact entry, you will be able to tell they are a contact and not a NHSmail user as it says (Contact) after their name and there is a contact book icon next to their name as per the screenshot below:



Thompson, Jimmy (Contact)

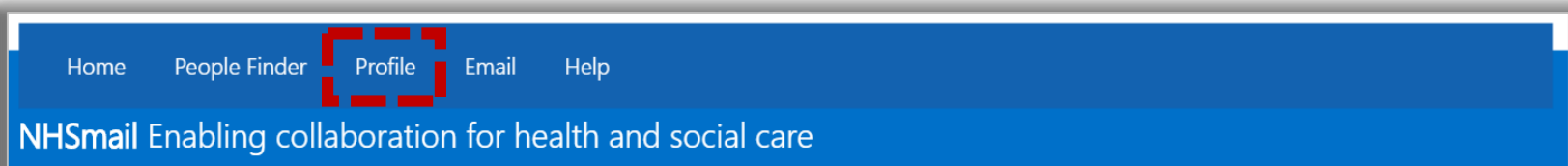
 Leeds Teaching Hospital,
jimt@hotmail.co.uk

10 25 50 1

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). If you are the owner of a shared mailbox, you can add and remove members and owners to the mailbox. To set up or delete a shared mailbox or change any other setting, contact your Local Administrator.

To manage your shared mailbox:

- 1 Click **Profile** in the navigation bar at the top of the screen



- 2 Click **Shared Mailboxes** at the top right of the screen

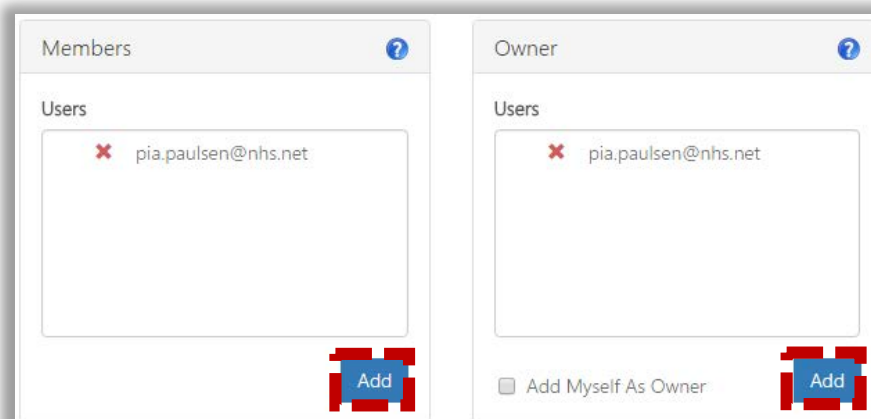


A list of mailboxes that you are an owner of will be listed automatically

- 3 Click the **Display Name** of the mailbox you want to manage

- 4 Click the **Add** to add Members or Users to the shared mailbox

You can also remove members or users by clicking the red cross next to their email address



- 5 Type the user's name into the search box

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

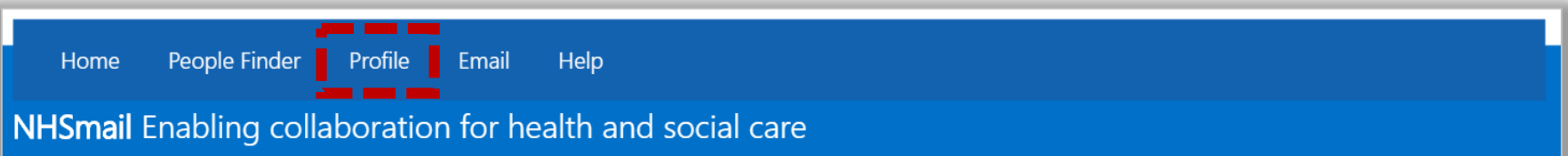
- 6 Click **Update** at the bottom of the page

Creating a static distribution list

A static distribution list is used to send an email to more than one person. It 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. All distribution lists you create will need to be approved by your Local Administrator. You will receive an email notification as soon as the distribution list has been approved and is live

To create a static distribution list:

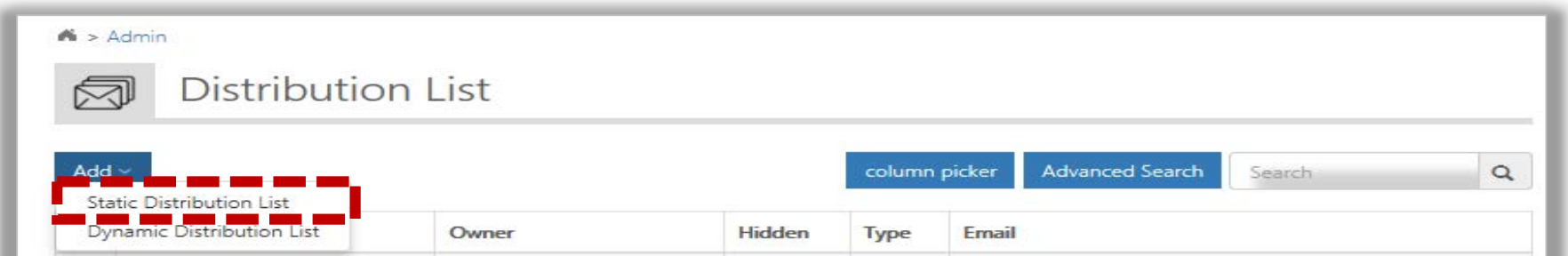
- 1 Click **Profile** in the navigation bar at the top of the screen



- 2 Click **Distribution List** at the top right of the screen

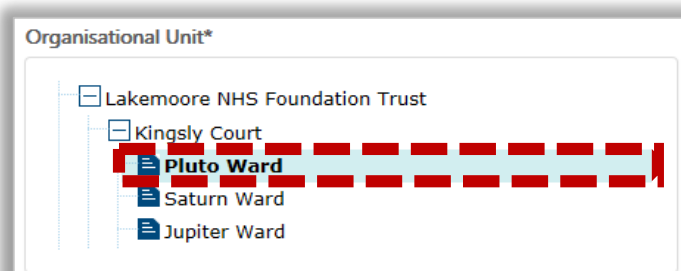


- 3 Click **Add** in the top left of the screen and select **Static Distribution List** from the drop down menu



Your organisation will already be selected from the drop down menu

- 4 If you know the organisational unit the distribution list belongs to, click the + box to expand the Organisation Unit list and select a **Organisation Unit** and click **Ok**



An organisation unit refers to the department, ward, building or site that are within your organisation

Creating a static distribution list

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



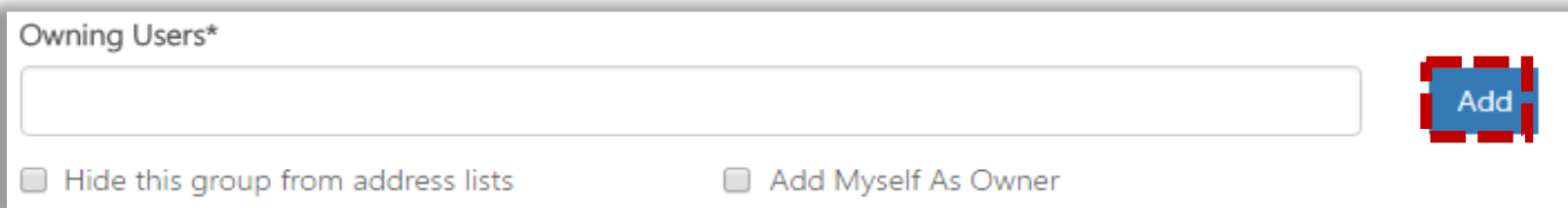
The screenshot shows a form with two input fields. The first field is labeled 'Name*' and contains the text 'Name'. This field is highlighted with a red dashed border. The second field is labeled 'Email Address' and contains the text 'Email Address'.

Names must be less than 15 characters and contain no spaces 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 Select **Add** next to **Owning Users** to add owners to the distribution list

You can add yourself as an owner by simply ticking "Add Myself As Owner"



The screenshot shows a section titled 'Owning Users*'. It features a search box on the left and an 'Add' button on the right, which is highlighted with a red dashed border. Below the search box, there are two checkboxes: 'Hide this group from address lists' and 'Add Myself As Owner'.

7 Type the 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



Warning

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

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

If you accidentally add a user as an owning user, you can remove them by clicking the red cross to the left of their email address

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

11 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

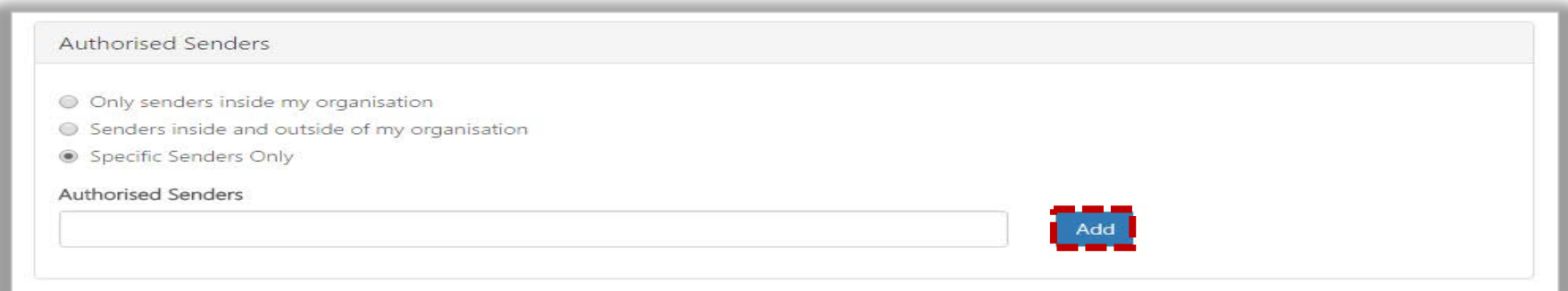
Adding authorised senders to static distribution lists

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 **inside your organisation, inside and outside your organisation** 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



The screenshot shows a web interface for configuring authorized senders. At the top, it says "Authorised Senders:". Below this, there are three radio button options: "Only senders inside my organisation", "Senders inside and outside of my organisation", and "Specific Senders Only". The "Specific Senders Only" option is selected. Below the options, there is a text input field labeled "Authorised Senders" and a red "Add" button.

Only senders inside my organisation: all users in your organisation will be able to send emails to the distribution list

Senders inside and outside of my organisation: all users inside and outside your organisation 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

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

3 Click **Select** at the bottom of the page once all authorised senders have been selected

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 the required recipients

3 Select Recipients for the Distribution List by checking the **box** to the left of the user's display name

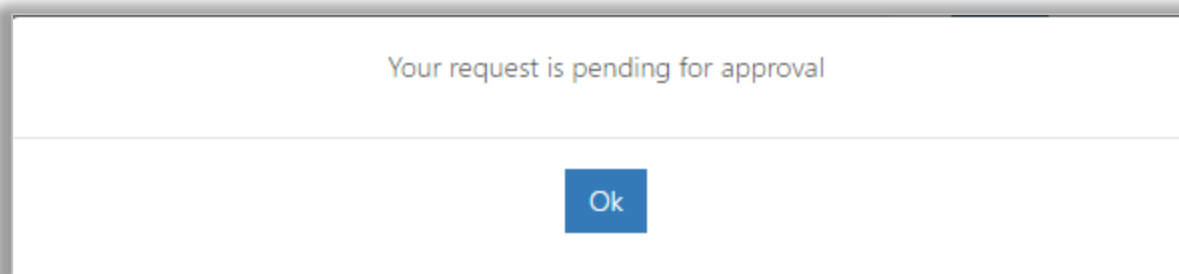
When a recipient is successfully added to the distribution list their name will appear in the Members box

4 When all recipients are checked click **Select**

Check that all details for the distribution list are correct

5 Select **Complete** at the bottom of the page

The below notification will pop up indicating that the distribution list has been sent for approval by Local Administrator



Once your Local Administrator has approved or rejected your distribution list, you will receive an email notification to say whether or not the distribution list is now live



Additional Information

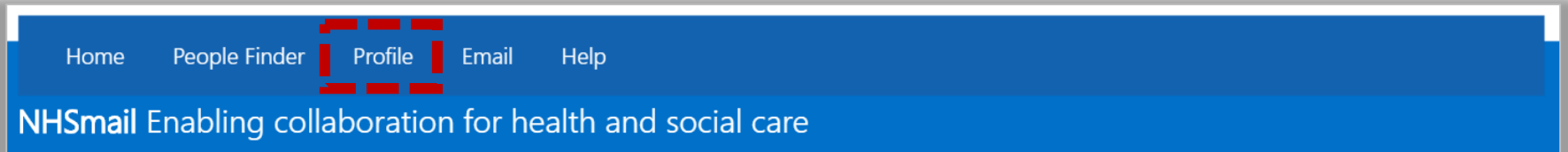
- There is a maximum number of 500 recipients for a static distribution list
- For information on how to Edit a static distribution list, refer to Editing a distribution list

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

To edit a static distribution list:

- 1 Click **Profile** in the navigation bar at the top of the screen



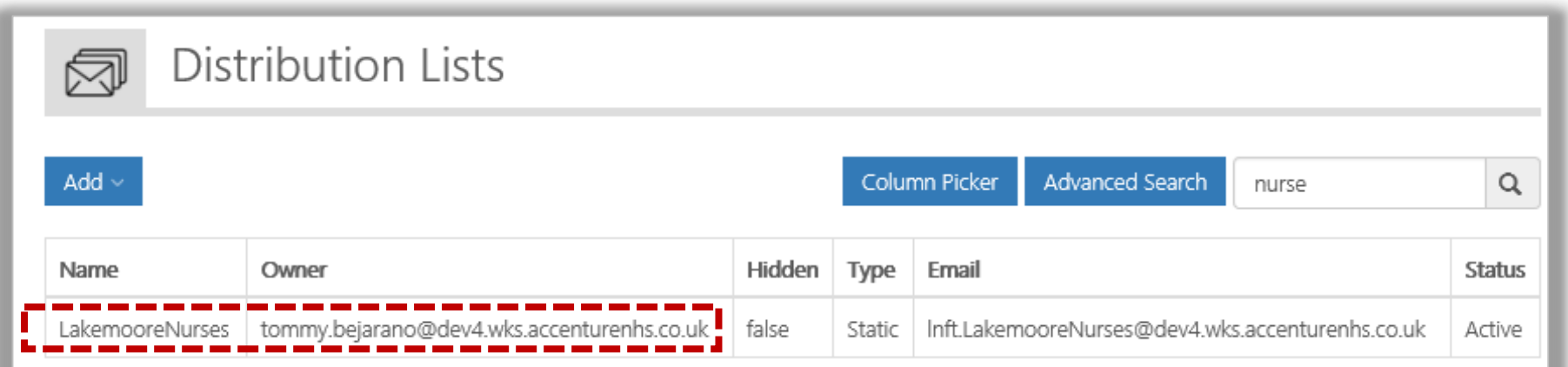
- 2 Click **Distribution List** at the top right of the screen



- 3 Type the name of the distribution list in the search box

Refer to the [Searching for a Distribution List](#) section for more information

- 4 Click on the **Name** of the static distribution list to open the Edit Static Distribution List Page



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

Although the Edit Distribution List page (shown below) 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 screenshot shows the 'Edit Distribution List' page. The 'Status' section is highlighted with a red dashed border. The 'Details' section includes fields for Name (PlutoWard1) and Email Address (Inft.PlutoWard1@dev4.wks.ac). The 'Owing Users' section shows a user jackie.jones@dev4.wks.accenturenhs.com/move with an 'Add' button. The 'Status' section shows a 'Pending' status, a 'Created on' date of 25-07-2016 08:55, and fields for 'Last Updated' and 'Updated By'. The 'Actions' section has a 'Delete' button. The 'Add Recipients to Distribution List' section shows the same user with an 'Add' button. The 'Directory Properties' section shows the 'Organisation Unit Edit' path: Lakemoore NHS Foundation Trust > Kingsly Court > Pluto Ward.

When all editing is complete:

6 Click **Update** at the bottom of the Edit Distribution List page



Additional Information

- Refer to [Create Static Distribution Lists](#) for more information on policies and best practice

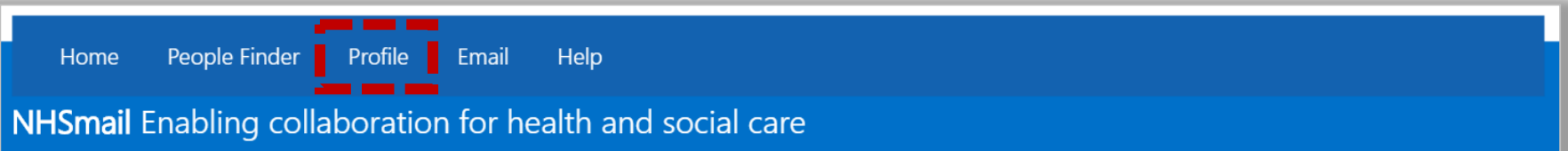
Creating a dynamic distribution list

Unlike static distribution lists which are set up for a defined set of recipients, 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 who matches the criteria defined for the group. You should therefore be mindful of the criteria you set, as this could apply to users outside of your organisation. There is no maximum number of users that can be included in a dynamic distribution list. All distribution lists you create will need to be approved by your Local Administrator. You will receive an email notification as soon as the distribution list has been approved and is live

Dynamic Distribution Lists are currently not available. Refer to portal.nhs.net/help

To create a dynamic distribution list:

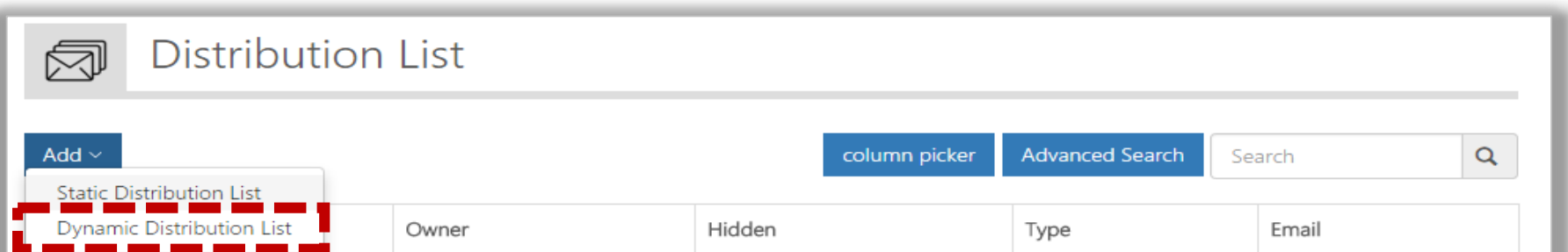
1 Click **Profile** in the navigation bar at the top of the screen



2 Click **Distribution List** at the top right of the screen

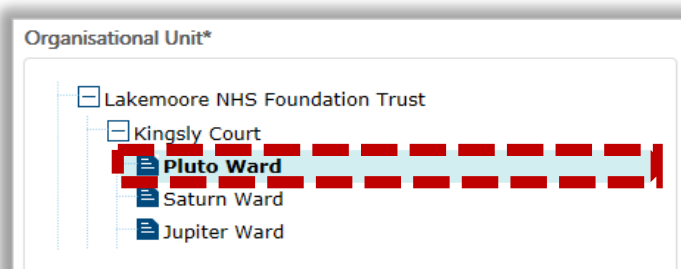


3 Click **Add** in the top left of the screen and select **Dynamic Distribution List** from the drop down menu



Your organisation will already be selected from the drop down menu

4 If you know the organisational unit the distribution list belongs to, click the + box to expand the Organisation Unit list and select a **Organisation Unit** and click **Ok**



An organisation unit refers to the department, ward, building or site that are within your organisation

Creating a dynamic distribution list

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

Name*	Email Address
<input type="text" value="Name"/>	<input type="text" value="Email Address"/>

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

Note: Names must be less than 15 characters and contain no spaces or special characters

To set an owner for the distribution list:

6 Click **Add** next to Owing User's

Owning Users*	<input type="text"/>	<input type="button" value="Add"/>
<input type="checkbox"/> Hide this group from address lists		

7 Search for the Owing User(s) and click the tick box next to their name and click **Select**

	Display Name	Mailbox Type	Status	Email	Telephone	Admin Role
<input type="checkbox"/>	KING, James (LAKEMOORE NHS FOUNDATION TRUST)	User	PendingErr	james.king@dev4.wks.accenturenhs.co.uk		
<input type="checkbox"/>	JONES, Jackie (LAKEMOORE NHS FOUNDATION TRUST)	User	Active (Leaver)	jackie.jones@dev4.wks.accenturenhs.co.uk	07867263726	
<input type="checkbox"/>	KING, Francis (LAKEMOORE NHS FOUNDATION TRUST)	User	Active	francis.king@dev4.wks.accenturenhs.co.uk		Local Admin
<input type="checkbox"/>	HUNT, Mary (LAKEMOORE NHS FOUNDATION TRUST)	User	Active	mary.hunt@dev4.wks.accenturenhs.co.uk		
<input type="checkbox"/>	PATEL, Shija (LAKEMOORE NHS FOUNDATION TRUST)	User	Active	shija.patel@dev4.wks.accenturenhs.co.uk		
<input type="checkbox"/>	BLACK, Thomas (LAKEMOORE NHS FOUNDATION TRUST)	User	Active	thomas.black@dev4.wks.accenturenhs.co.uk		
<input type="checkbox"/>	KING-SMITH, James (LAKEMOORE NHS FOUNDATION TRUST)	User	PendingErr	james.king-smith@dev4.wks.accenturenhs.co.uk	07827283718	

10 25 50

Note: you can only select one owning user

8 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

Creating a dynamic distribution list

Setting authorised senders

1 Choose the category of authorised senders for this distribution list

Authorised Senders

Only senders inside my organisation
 Senders inside and outside of my organisation
 Specific Senders Only

Only senders inside my organisation: all users in your organisation will be able to send emails to the distribution list

Senders inside and outside of my organisation: all users inside and outside your organisation 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

If you choose **Specific Senders Only**:

2 Click **Add** next to Authorised Senders

Authorised Senders



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

	Display Name	Mailbox Type	Status	Email	Telephone	Admin Role
<input checked="" type="checkbox"/>	KING, James (LAKEMOORE NHS FOUNDATION TRUST)	User	PendingErr	james.king@dev4.wks.accenturenhs.co.uk		
<input checked="" type="checkbox"/>	JONES, Jackie (LAKEMOORE NHS FOUNDATION TRUST)	User	Active (Leaver)	jackie.jones@dev4.wks.accenturenhs.co.uk	07867263726	
<input checked="" type="checkbox"/>	KING, Francis (LAKEMOORE NHS FOUNDATION TRUST)	User	Active	francis.king@dev4.wks.accenturenhs.co.uk		Local Admin
<input checked="" type="checkbox"/>	HUNT, Mary (LAKEMOORE NHS FOUNDATION TRUST)	User	Active	mary.hunt@dev4.wks.accenturenhs.co.uk		
<input checked="" type="checkbox"/>	PATEL, Shija (LAKEMOORE NHS FOUNDATION TRUST)	User	Active	shija.patel@dev4.wks.accenturenhs.co.uk		
<input checked="" type="checkbox"/>	BLACK, Thomas (LAKEMOORE NHS FOUNDATION TRUST)	User	Active	thomas.black@dev4.wks.accenturenhs.co.uk		
<input checked="" type="checkbox"/>	KING-SMITH, James (LAKEMOORE NHS FOUNDATION TRUST)	User	PendingErr	james.king-smith@dev4.wks.accenturenhs.co.uk	07827283718	

10 25 50

Creating a dynamic distribution list

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

Add Recipients to Distribution List

Distribution List Rule 0

AND

Add Rule Add Group Delete Group

View Target Users

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

Add Recipients to Distribution List

Distribution List Rule (Work Area =)

AND

Work Area = select a work area

Add Rule Add Group Delete Group Delete

View Target Users

3 Select from the drop down whether the condition is 'equal to' (=) or 'not equal to' (!=)

Add Recipients to Distribution List

Distribution List Rule (Work Area =)

AND

Work Area = select a work area

Add Rule Add Group Delete Group Delete

View Target Users

Creating a dynamic distribution list

4

Select the second condition for the rule from the drop down list (e.g. Acute Medicine)

The screenshot shows the 'Distribution List Rule' configuration interface. A dropdown menu is open, showing a list of work areas with 'Acute Medicine' selected. The rule configuration shows 'AND' as the logical operator and 'Work Area = Acute Medicine' as the condition. Buttons for 'Add Rule', 'Add Group', 'Delete Group', and 'Delete' are visible.

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

To set additional rules within the same group:

5

Click **Add Rule** and repeat **steps 1-4**

6

Select **AND** from the drop down if multiple rules must apply/ Select **OR** if at least one rule must be applied

A close-up of the logical operator dropdown menu showing 'AND' selected.

If **AND** is selected, all subsequent rule must apply to the user in order to be added to the distribution list. If **OR** is selected at least one of the subsequent rules need to apply to the user
If you make an error whilst creating a rule you can delete it. To delete a rule:

7

Click **Delete** next to the rule you want to delete

A screenshot of the 'Add Rule', 'Add Group', and 'Delete Group' buttons, with the 'Delete' button highlighted.

Creating a dynamic distribution list

Grouping rules

Grouping rules allows you to apply multiple rules to determine dynamic distribution list recipients. You will need to state whether a) all groups of rules need to be true or b) at least one group of rules 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

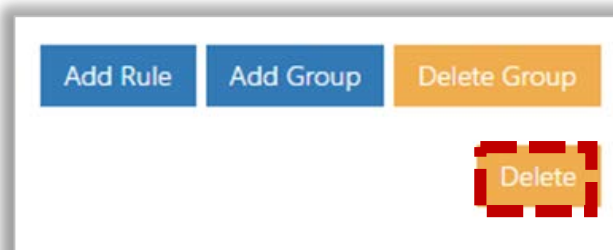
The screenshot shows the 'Add Recipients to Distribution List' interface. At the top, it displays the current rule: '(Organisation = Aintree University Hospital AND (Clinical Role = Administrator OR Clinical Role = Administrative Assistant))'. Below this, there are two groups of rules, each enclosed in a red dashed border. The first group has an 'AND' dropdown and a rule 'Organisation = Aintree University Hospital'. The second group has an 'OR' dropdown and two rules: 'Clinical Role = Administrator' and 'Clinical Role = Administrative Assistant'. Each rule has a 'Delete' button next to it. At the top right of the interface are buttons for 'Add Rule', 'Add Group', and 'Delete Group'. At the bottom right is a 'View Target Users' button.

In the example above, as the 'AND' condition has been set for the first group, recipients would have to meet ALL the conditions specified to appear on the distribution list. If the OR condition is selected however, recipients would be selected that meet ANY of the conditions specified within that group

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

1

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




Creating a dynamic distribution list

Viewing Dynamic Distribution List Recipients

To view all target users of the distribution group:

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



Check that all details for the distribution list are correct

- 2 Select **Complete**



After selecting **Complete**, a message will pop up indicating that the request to create a dynamic distribution list has been sent for approval. Users will receive an e-mail once the list has been created or rejected.



- 3 Select **OK** and **Back** to return



Additional Information

- Dynamic distribution groups do not have a maximum number of recipients
- For information on how to edit a dynamic distribution list, refer to [Editing a distribution list](#)

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. Following an edit to a distribution list, this will have to be sent for approval to your Local Administrator again. On approval, the distribution list is updated and the changes will apply to all future emails sent to this list

To edit a dynamic distribution list:

- 1 Click **Profile** in the navigation bar at the top of the screen



- 2 Click **Distribution List** at the top right of the screen



- 3 Type the name of the distribution list in the search box

Refer to the [Searching for a Distribution List](#) section for more information

- 4 Click on the **Name** of the dynamic distribution list to open the Edit Distribution List page

The screenshot shows the 'Distribution Lists' page. At the top, there is a search bar and buttons for 'Add', 'Column Picker', and 'Advanced Search'. Below the search bar is a table with the following data:

Name	Owner	Hidden	Type	Email	Status
DVTstatic	nadia.tuner	false	Static	Inft.DVTstatic@dev4.wks.accenturenhs.co.uk	Active
CardioWardDL	debbie.king	false	Static	Inft.CardioWardDL@dev4.wks.accenturenhs.co.uk	Active
AUHGroup	james.test1	false	Dynamic	auh.AUHGroup@dev4.wks.accenturenhs.co.uk	Active
DVTDL	debbie.king@dev4.wks.accenturenhs.co.uk	false	Dynamic	Inft.DVTDL@dev4.wks.accenturenhs.co.uk	Pending

At the bottom of the table, there are pagination controls showing '10', '25', and '50' items per page.

Approved distribution lists will show a status of active. Distribution lists yet to be approved by your Local Administrator will show a status of pending

Editing a dynamic distribution list

Although the Edit Dynamic Distribution List page (shown below) 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

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

Edit Dynamic Distribution List

Details

Name* PlutoDynamic Email Address Inft.PlutoDynamic@dev4.wks

Owning Users* Jackie.jones@dev4.wks.accenturenhs.com@move Add

Hide this group from address lists

Description (Shown in directory)

Authorized Senders

Only senders inside my organisation
 Senders inside and outside of my organisation
 Specific Senders Only

Status

Status : Pending

Created on : 29 Oct 2016 09:11

Last Updated :
 Updated By :

Actions

Delete

Directory Properties

Organisation Unit Edit
 Lakemoore NHS Foundation Trust

Add Recipients to Distribution List

Distribution List Rule (Country = England AND Clinical Specialty = Accident & Emergency AND Role = A & E Staff Nurse (Temporary) London Cluster Only)

AND

Add Rule Add Group Delete Group

Country - England Delete

Clinical Specialty - Accident & Emergency Delete

Role - A & E Staff Nurse (Temporary) London Cl Delete

View Target Users

When all editing is complete:

5

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

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, you will no longer be able to send emails to this group of contacts

To delete a static or dynamic distribution list:

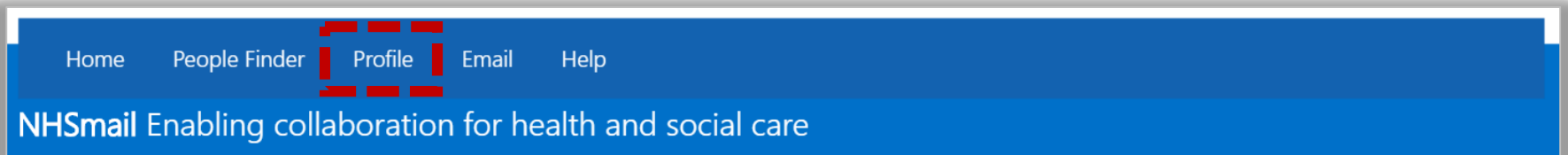


Warning

Once a distribution list is deleted it cannot be recovered. Please ensure you have selected the correct list before following the steps below

1

Click **Profile** in the navigation bar at the top of the screen



2

Click **Distribution List** at the top right of the screen



3

Type the distribution list in the search box

Refer to the [Searching for a Distribution List](#) section for more information

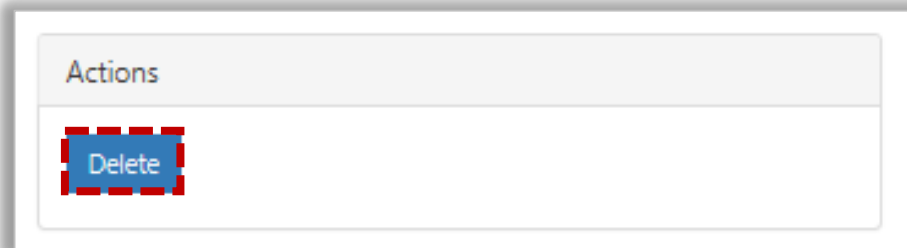
4

Click the distribution list **Name** to open the Distribution List Details Page

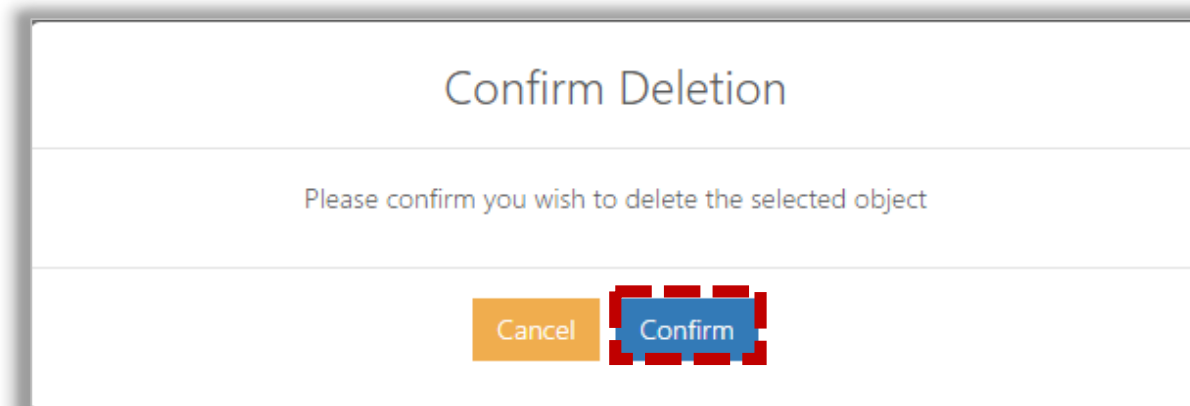
Name	Owner	Hidden	Type	Email	Status
PlutoWard1	jackie.jones	false	Static	Inft.PlutoWard1@dev4.wks.accenturenhs.co.uk	Active
PlutoDynamic	jackie.jones	false	Dynamic	Inft.PlutoDynamic@dev4.wks.accenturenhs.co.uk	Active

Deleting a static or dynamic distribution list

5 Click **Delete** in the Actions Box



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



Additional Information

- You will not be able to re-use the name of a distribution list that has been deleted. So you must be absolutely sure that the list is no longer needed before deleting it

Searching for a Distribution List

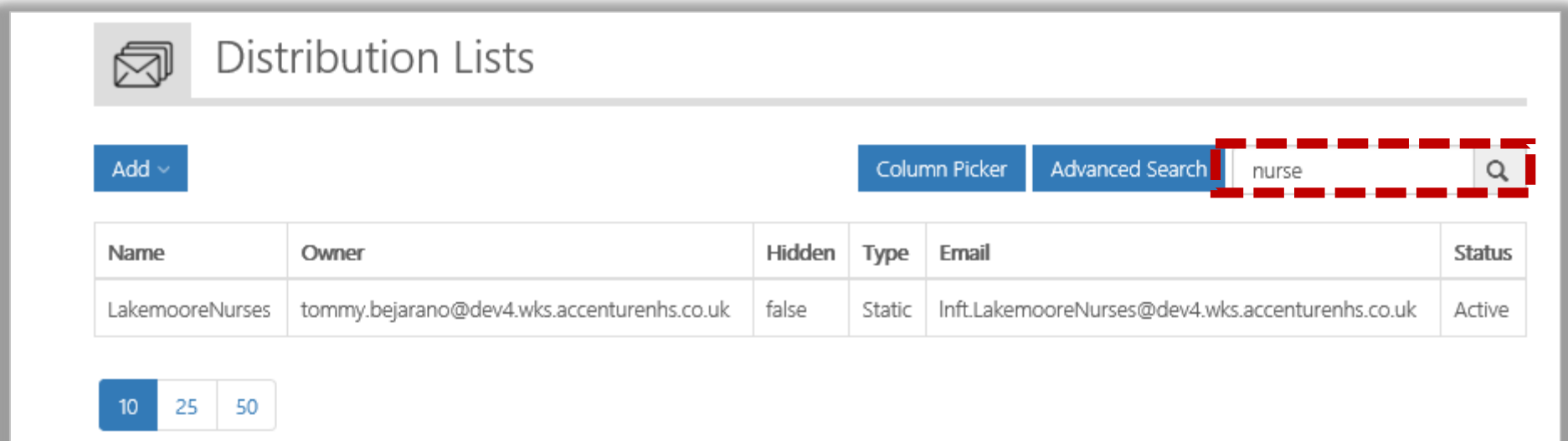
If you want to edit (e.g. add or remove members) or delete any distribution lists you manage, you first need to find that list by using the Search function. You can also search in the distribution lists you manage, for those that contain the name of specific members. This search feature is the same for both static and dynamic distribution lists. You will only be able to search for users within your organisation and Distribution Lists that you have created. If you want to add users to one of your distribution lists, search for the list first as explained below and then refer to [Editing a Distribution List](#)

To search for an entry:

1 Navigate to the **Distribution Lists** screen

For more information on creating and editing distribution lists refer to: [Creating a static distribution list](#), [Creating a dynamic distribution list](#) and [Editing a distribution list](#)

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



The screenshot shows the 'Distribution Lists' interface. At the top, there is a header with an envelope icon and the text 'Distribution Lists'. Below the header, there is a toolbar with an 'Add' button, a 'Column Picker' button, and an 'Advanced Search' button. The search bar contains the text 'nurse' and a magnifying glass icon. Below the toolbar is a table with the following columns: Name, Owner, Hidden, Type, Email, and Status. The table contains one row with the following data: Name: LakemooreNurses, Owner: tommy.bejarano@dev4.wks.accenturenhs.co.uk, Hidden: false, Type: Static, Email: Inft.LakemooreNurses@dev4.wks.accenturenhs.co.uk, Status: Active. At the bottom left of the screen, there are three buttons labeled '10', '25', and '50' for pagination.

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 central 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

Advanced Search for Distribution Lists

When searching for a particular distribution list or the owners of that list, if the Simple Search feature displays too many Directory entries, you can use the Advanced Search feature to refine your search using multiple criteria. You can also use the column picker to refine the search. Refer to the section [Using the Column Picker](#) for more information

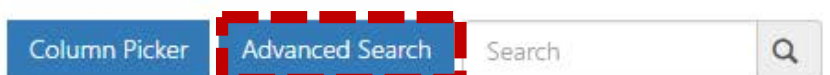
Note: you will only be able to search for users within your organisation and Distribution Lists that you have created

To use the Advanced Search feature:

1 Navigate to the **Distribution Lists** screen

For more information on creating and editing distribution lists refer to: [Creating a static distribution list](#), [Creating a dynamic distribution list](#) and [Editing a distribution list](#)

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



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](#)

3 Type your **search word(s)** into the corresponding display field text box (e.g. type Tommy in the Name textbox)

The screenshot shows the 'Distribution Lists' interface. At the top, there is a header with an envelope icon and the text 'Distribution Lists'. Below the header, there is a navigation bar with an 'Add' button, a 'Column Picker' button, and a 'Simple Search' button. The main search area contains several input fields: 'Name' (with a search icon), 'Owner' (with a search icon), 'Hidden' (with a dropdown arrow), 'Type' (with a dropdown arrow), 'Email' (with a search icon), and 'Status' (with a dropdown arrow). The 'Name' and 'Owner' fields are highlighted with a red dashed border. Below the search area is a table with the following data:

Name	Owner	Hidden	Type	Email	Status
Nurses	cecily.bourget@dev4.wks.accenturenhs.co.uk	false	Static	ecnt.Nurses@dev4.wks.accenturenhs.co.uk	Active

At the bottom left, there are pagination controls with buttons for '10', '25', and '50' items per page.

The results of the search will be displayed on the screen. You can search based on more than one display field at a time

To go back to viewing the full list of users, delete the text from the search display field(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 Distribution List creation screen

To use the column picker:

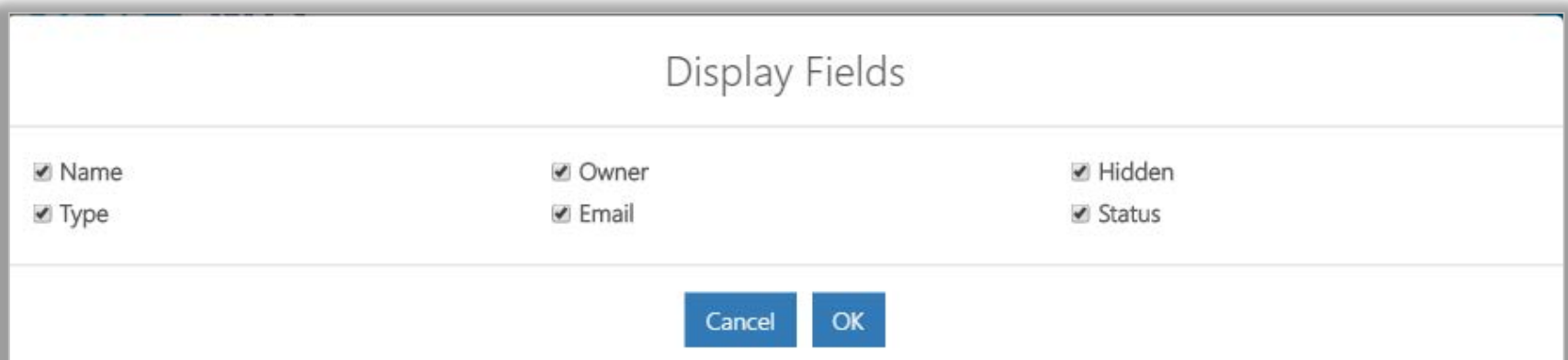
1 Navigate to the **Distribution Lists** Screen

For more information on creating and editing distribution lists refer to: [Creating a static distribution list](#), [Creating a dynamic distribution list](#) and [Editing a distribution list](#)

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

A screenshot of a dialog box titled 'Display Fields'. It contains a list of fields with checkboxes: 'Name', 'Type', 'Owner', 'Email', 'Hidden', and 'Status'. All checkboxes are checked. At the bottom of the dialog are two buttons: 'Cancel' and 'OK'.

4 Click **OK**

Once you have set your display fields, these settings will remain for the next time you log into the Portal

Searching for a NHSmail Portal entry

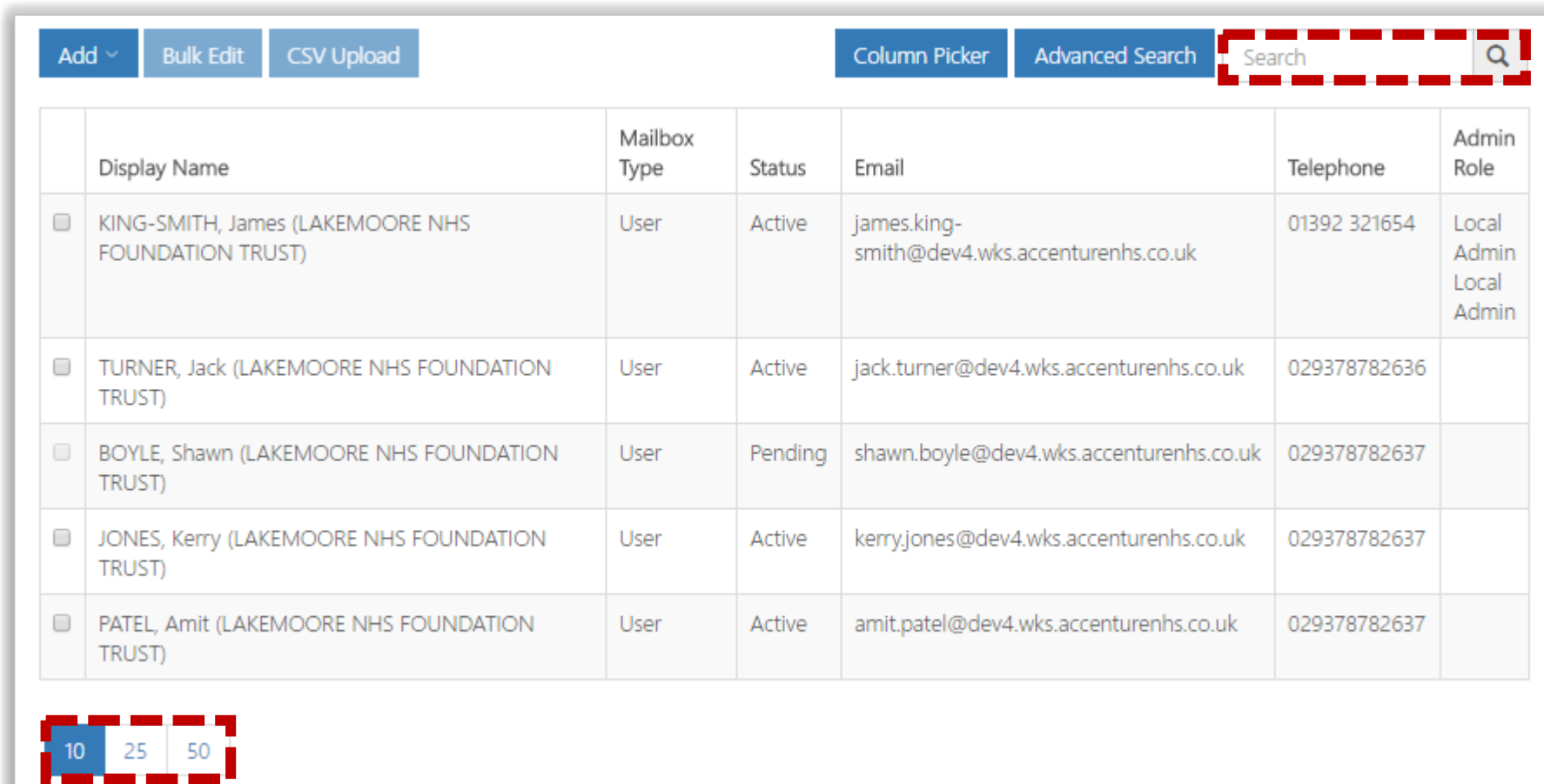
Searching for an entry

When performing actions such as 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. The example below is for finding a user to add to a distribution list.

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

1 Navigate to the **Distribution Lists** screen

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



The screenshot shows the user management interface. At the top, there are buttons for 'Add', 'Bulk Edit', and 'CSV Upload'. On the right, there are buttons for 'Column Picker', 'Advanced Search', and a search box with a magnifying glass icon. Below the buttons is a table of users with the following columns: Display Name, Mailbox Type, Status, Email, Telephone, and Admin Role. The table contains five rows of user data. At the bottom left, there are navigation buttons for '10', '25', and '50' users per page.

	Display Name	Mailbox Type	Status	Email	Telephone	Admin Role
<input type="checkbox"/>	KING-SMITH, James (LAKEMOORE NHS FOUNDATION TRUST)	User	Active	james.king-smith@dev4.wks.accenturenhs.co.uk	01392 321654	Local Admin Local Admin
<input type="checkbox"/>	TURNER, Jack (LAKEMOORE NHS FOUNDATION TRUST)	User	Active	jack.turner@dev4.wks.accenturenhs.co.uk	029378782636	
<input type="checkbox"/>	BOYLE, Shawn (LAKEMOORE NHS FOUNDATION TRUST)	User	Pending	shawn.boyle@dev4.wks.accenturenhs.co.uk	029378782637	
<input type="checkbox"/>	JONES, Kerry (LAKEMOORE NHS FOUNDATION TRUST)	User	Active	kerry.jones@dev4.wks.accenturenhs.co.uk	029378782637	
<input type="checkbox"/>	PATEL, Amit (LAKEMOORE NHS FOUNDATION TRUST)	User	Active	amit.patel@dev4.wks.accenturenhs.co.uk	029378782637	

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 central 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

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

Finding your Local Administrator

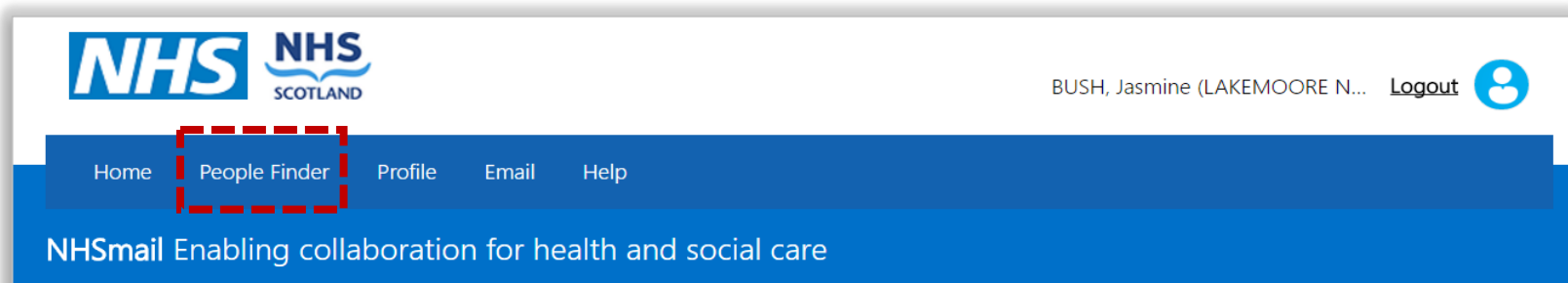
Local Administrators (LA) are the prime contacts responsible for the administrative duties relating to your NHSmail account. For example, unlocking your account, setting up shared mailboxes and authorising distribution lists. You can usually find your LA by contacting your local IT support, however you can also use the People Finder (NHS Directory) within the NHSmail Portal to find the names and contact details of the LAs for your organisation

To find the details of your LA:

1 Log into the NHSmail Portal at www.nhs.net

Note: if you are using a secure N3 or SWAN connection to access the Portal, you will not need to log in to access the People Finder (NHS Directory)

2 Click **People Finder** in the navigation bar at the top of the screen



3 Type your **own name** into the search box and press the **Enter** key



4 Click on your **name** to open your NHS Directory entry



4 Click on your Organisation's Name



 BUSH, Jasmine (LAKEMOORE NHS FOUNDATION TRUST)

About Me

My name is Jasmine and I am a DVT nurse at Lakemoore Foundation Trust. I have worked for the NHS for 2 years.

Roles:
Clinical Specialities:
Work Area:

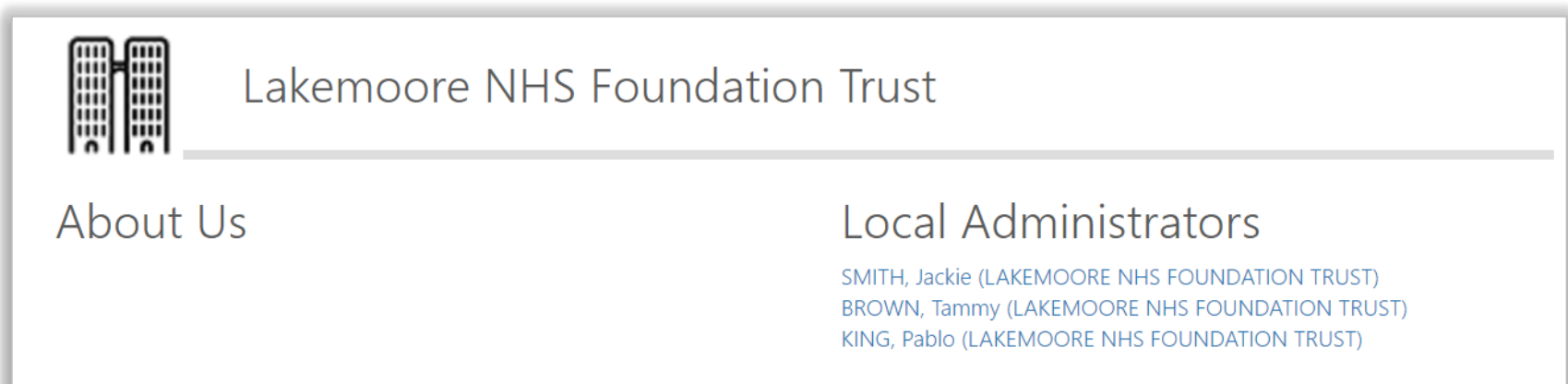
Get in Touch


✉ jasmine.bush@dev4.wks.accenturenhs.co.uk
Telephone: 01726536748
Mobile: 07826354758
Pager:
Fax:
Web page:

Organisation

Lakemoore NHS Foundation Trust
Address:
Lakemoore NHS Foundation Trust
Lakemoore NHS Foundation Trust
Greater London
0987654321

A screen containing the details of your Organisations will load. From this screen you can view a list of LAs that work at your organisation



 Lakemoore NHS Foundation Trust

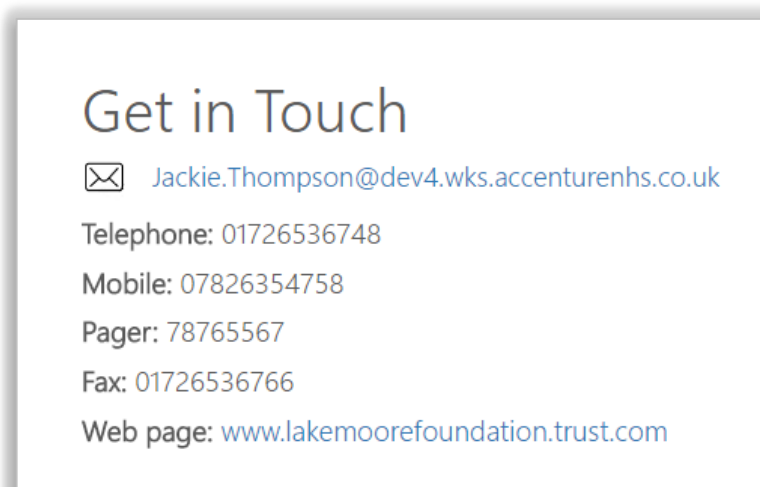
About Us

Local Administrators

SMITH, Jackie (LAKEMOORE NHS FOUNDATION TRUST)
BROWN, Tammy (LAKEMOORE NHS FOUNDATION TRUST)
KING, Pablo (LAKEMOORE NHS FOUNDATION TRUST)

To retrieve the contact details of your LA:

5 Click on the name of the LA you wish to contact



Get in Touch

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View the LA's email address, telephone, mobile, pager, fax numbers and website under the Get in Touch section