
Shared Mailbox Guide for NHSmail 2

Version 1.0

This document is available for users during transition. The final version will be published post transition.

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1 Introduction – What is a shared mailbox?

1.1 Purpose of Document

Target Audience: NHSmail 2 users who wish to set up a shared mailbox, and Administrators who administer the shared mailboxes at their organisation

A shared mailbox is the new terminology for what was previously referred to as a Generic Mailbox (GM). Just like a GM, a shared mailbox is a mailbox that is not associated with one particular user. It is usually accessed by multiple staff members from the same department or project for example. All staff who have access to the shared mailbox can send emails 'on behalf' of the mailbox.

2 When and when not to use a shared mailbox

You should use a shared mailbox (previously known as a Generic Mailbox (GM)) in the following circumstances:

- The same mailbox needs to be accessed by a number of team members. This can be very useful for an organisation providing centralised services, such as a helpdesk or human resources.
- To send individual patient appointment reminders via NHSmail 2 – using a shared mailbox means the message to the patient is sent from a suitably named account rather than a person. Note applications cannot access shared mailboxes.
- If emails are managed by a team a shared mailbox is easier to maintain than a personal mailbox. If a team member is absent, the emails can still be managed effectively.
- The activity of a shared mailbox is tracked and kept for audit and security purposes; therefore it is a secure way of providing a mailbox for multiple people to use. If a personal account is set up and login details shared with a number of people there is no way of tracking who a particular email has been sent by.

Circumstances in which a shared mailbox should not be used:

- Confidential data intended for one individual member only but sent from or received by the shared mailbox.
- Access is required by applications or mobile phones

3 Shared mailbox requirements

- Only an NHSmail 2 Administrator can create a shared mailbox and initially set up permissions for users. A local administrator can grant owning permissions to any user within their organisation. Once a user has 'Owner' permissions they can manage the shared mailbox within Outlook Web App.

4 Shared mailbox users with delegated access

Users of shared mailboxes with delegated access can manage shared mailboxes via Outlook Web App. Shared mailbox users can edit the shared mailbox permissions if they are given 'Owner' permissions. When managing the shared mailbox permissions, users must ensure that only the correct staff have the appropriate access permissions. Users will manage shared mailboxes via Outlook Web App.

5 Shared mailbox facts

- Only administrators can create shared mailboxes.
- It is possible for the members of a shared mailbox to set an Out of Office message for the mailbox.
- The ability to transfer shared mailboxes between organisations is a new feature of NHSmail 2.

6 Naming a shared mailbox

Shared mailboxes should be named according to the following rules:

- Shared mailbox names may contain alpha-numeric characters (a-z, A-Z, 0-9).
- The mailbox name must not be greater than 30 characters.
- The email address format for a shared mailbox will be `shortorgname.smname@nhs.net`, where 'shortorgname' is the short organisation name of the organisation that owns the shared mailbox and 'smname' is the name of the shared mailbox as provided by its creator.
- There are no restrictions on the name you can choose but it must be prefixed with the short organisation name at all times. This is not optional.
- An example is as follows: a user requests a shared mailbox called 'helpdesksupport' to be created under The Health and Social Care Information Centre organisation. This would be created as `hscic.helpdesksupport@nhs.net`.

7 How to access a shared mailbox

As well as accessing your shared mailbox over the Internet through the Outlook Web App (OWA), it can also be accessed through your Outlook Desktop client.

To do this you need to configure Outlook with your NHSmail 2 account that has been set up with permissions to access your shared mailbox. Instructions on how to do this can be found below.

In Outlook 2007:

1. Open Outlook 2007
2. Click **Tools** at the top of the window
3. Select **Account Settings from the drop down list?**

4. Double click your profile name in the table on the **Email** tab
5. Click **More Settings** at the bottom of the window
6. Select the **Advanced** tab
7. Click **Add**, type the name of the shared mailbox in the text box and click **OK**
8. Click **OK, Next, Finish** and **Close**

In Outlook 2010 and Outlook 2013:

1. Open Outlook 2010/2013
2. Click **File** on the top left side of the window
3. Click the **Account Settings** button, and select **Account Settings**
4. Select your Exchange account and click the **Change** button at the top of the window
5. Click **More Settings** at the bottom right of the window
6. Select the **Advanced** tab
7. Click the **Add** button
8. Type the name of the shared mailbox and click **OK**
9. Click **Apply, OK, Next, Finish** and **Close**

You will now see your shared mailbox added into Outlook Desktop Client and displayed on the left hand menu.

For more information on accessing shared mailboxes via Outlook Web App, refer to the Delegated and Shared mailboxes module located within the Outlook Web App Learning Series available on the Training and Guidance pages.

8 Shared mailbox permissions

Once a user has been given owner permissions to a shared mailbox by their administrator they can then manage shared mailbox permissions in Outlook Web App. This means that users can give access to other users via Outlook Web App.

More information for administrators about granting permissions for a shared mailbox can be found in the *Administering Shared Mailboxes* section of the NHSmail Portal Administrator's guide located within the Portal Learning Series.