

NHSmail user provisioning

**Options for creating and managing
NHSmail user accounts and contact details
in the NHSmail service and NHS Directory**

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Introduction

NHSmail delivers a national directory service (NHS Directory) providing contact details for over one million staff, to enable day to day communications across health and social care organisations.

NHSmail enables organisations to provide regular and automated updates to people data in the NHS Directory in an open approach from a wide variety of sources. This is a key part of the strategy to empower each organisation to update and manage people data. To facilitate this, a number of discrete methods are available for organisations to provision and update user and contact objects in NHSmail.

Purpose

This document sets out the different options for adding, updating and removing user data from NHSmail. The objective is to ensure that each option is clearly described and for health and care organisations to be able to choose the best, most appropriate method to meet their individual needs.

This document outlines the capabilities and basic requirements for the following methods of adding, updating and deleting user information in the NHSmail service:

- Manual management of data through the NHSmail Portal
- Bulk upload of data via CSV files via the Portal
- Email submission of data with CSV files
- Automated data management via TANSync

The following areas are out of scope for this document:

- NHSmail Portal Service APIs, for which information can be found in the [Applications Guide](#)
- TANSync for which information can be found in the [TANSync Deployment Guide](#) (available separately)

NHSmail object types

This section provides an overview of the different types of objects and attributes that can be managed in the NHSmail service. Please note this refers to 'people' data types and not, for example, groups and distribution lists.

Users

The NHSmail service centres on the management of users, however there are two key classifications of users and it is important for planners within health and care organisations to understand the differences between them.

The main user type in NHSmail is a mailbox user. A mailbox user in NHSmail is a single, unique user account with the following attributes:

- A unique username and password
- An @nhs.net email address

- A mailbox quota (4GB as standard)
- A unique user ID (generated within NHSmail)

Contacts

NHSmail has a separate classification for users that do not have an NHSmail mailbox. These are contacts with an email address in an email system other than NHSmail. All mail-enabled contacts have one attribute in common; they must have an email address. Furthermore, that email address cannot be from the @nhs.net domain or @xyz.nhs.net sub-domain.

These contacts are added to NHSmail and will be included in an organisation's address list and be visible in the NHS Directory, as well as email applications such as Outlook Web App and Outlook.

At present, the NHSmail service does not support contact objects through TANSync. Further information on manually adding contacts to the NHS Directory can be found in the NHSmail [Portal Local Administrator Guide](#). Please refer to the Creating a Directory contact section.

Provisioning methods

This section details the various methods via which NHSmail accounts and contacts can be provisioned on the service.

Portal based provisioning

NHSmail users assigned to the Local Administrator or Primary Local Administrator roles can create mailbox users and contacts through the NHSmail Portal using a number of different methods.

Single object provisioning

Mailbox user and contact objects can be managed individually via the NHSmail Portal. Step by step instructions on how to create users are contained in the NHSmail [Portal Local Administrator Guide](#). Please refer to the User Management section.

Bulk object provisioning via CSV upload

Mailbox users can be added in bulk via the NHSmail Portal using the 'CSV Upload' feature. Step by step instructions on how to create users are contained in the NHSmail [Portal Local Administrator Guide](#). Please refer to the CSV Uploads section.

There are two formats of CSV files accepted by the bulk upload facility in the NHSmail Portal:

- The old NHSmail format, which is maintained for backward compatibility
- The new NHSmail format which provides additional options over and above the previous NHSmail format

An example of the new CSV file format can be found in the [NHSmail Push Connector Guide](#).

Email connector

NHSmail organisations can email a CSV file containing their people data to the connector.data@nhs.net mailbox for batch processing. This process will create new accounts and update accounts active in the NHS Directory. The process runs on a daily

basis and whilst organisations can submit as many CSV files via email as needed, only the most recent file will be processed.

Please note that users submitting CSV files for their organisation must be granted the connector Local Administrator role, by their LA, to perform that action.

There are two formats of CSV files accepted by the email connector service in the NHSmal Portal:

- The old NHSmal format, which is maintained for backward compatibility
- The new NHSmal format which provides additional options over and above the previous NHSmal format

TANSync connector

TANSync is a standard deployment of Microsoft Identity Manager packaged with a custom developed Management Agent able to connect to the NHSmal service API. TANSync replaces the legacy ‘pull’ connector service.

Organisations can use TANSync, or any other solution capable of interacting with the NHSmal web service API, to automatically provision mailbox users. There are many advantages to implementing TANSync, or a similar solution, such as:

- More frequent and automated data updates. TANSync can be run on a schedule to meet the local organisation’s needs more or less frequently than once per day
- Through the NHSmal service API, TANSync or any other service can write-back directory data from mailbox users or contacts into a wide variety of internal systems such as Active Directory or local databases / intranets

Detailed information on the [TANSync solution](#) can be found on the NHSmal Portal help pages.

Provisioning matrix

	TANSync	Portal – Single Update	Portal CSV upload	Email CSV
Create contact		Yes		
Create NHSmal account	Yes	Yes	Yes	Yes
Edit contact		Yes		
Edit NHSmal enabled account	Yes	Yes	Yes	Yes
Transfer contact between organisations		Yes		
Mark NHSmal account as leaver		Yes		
Delete contact		Yes		