Setting up the DXS Built-in Email Client

EMIS Web

A guide on how to setup DXS built-in email client

Content

1. Introduction

This document outlines the steps required to set up the DXS built-in email client, which can now be configured per user or practice-wide to align with the way your practice manages email referrals.

2. Setting up the DXS Email Client

2.1   For individuals using their own NHS email accounts

Each individual can log into their clinical system and carry out the following procedure:

1. Click on the "DXS Home" button.

Figure 1: Home Button on the DXS Toolbar

2. Click on "Options".

Figure 2: Options Button on the DXS Home Page

3. On the drop-down menu, select "Preferences".
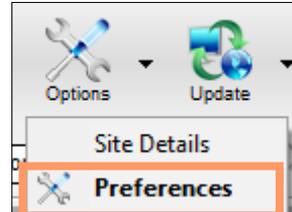
Figure 3: Preferences Button on Drop-down Menu

4. Click on the "General" tab.
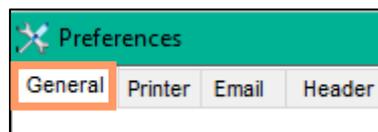
Figure 4: General Tab

5. Scroll down to the "Email Client" section.
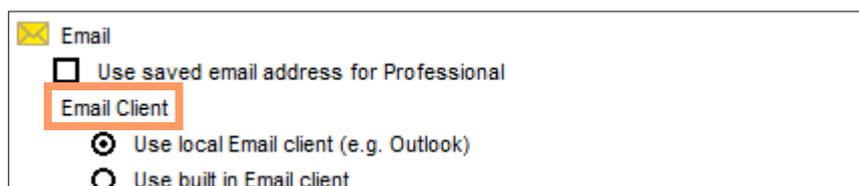
Figure 5: Email Client Section

6. Click in the circle to choose the "Use built in Email client" option.
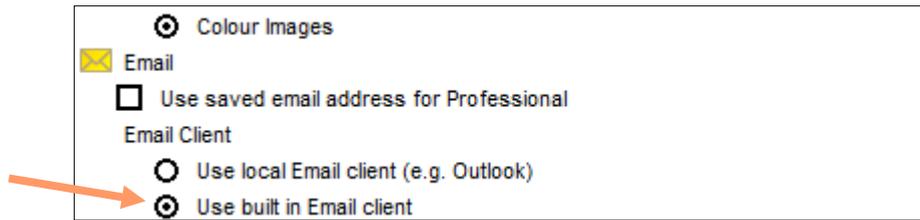
Figure 6: "Use Built-in Email Client" Option

7. Now click on the "Email" tab.

Figure 7: Email Tab

8. Firstly, click on the "Account Details" tab.
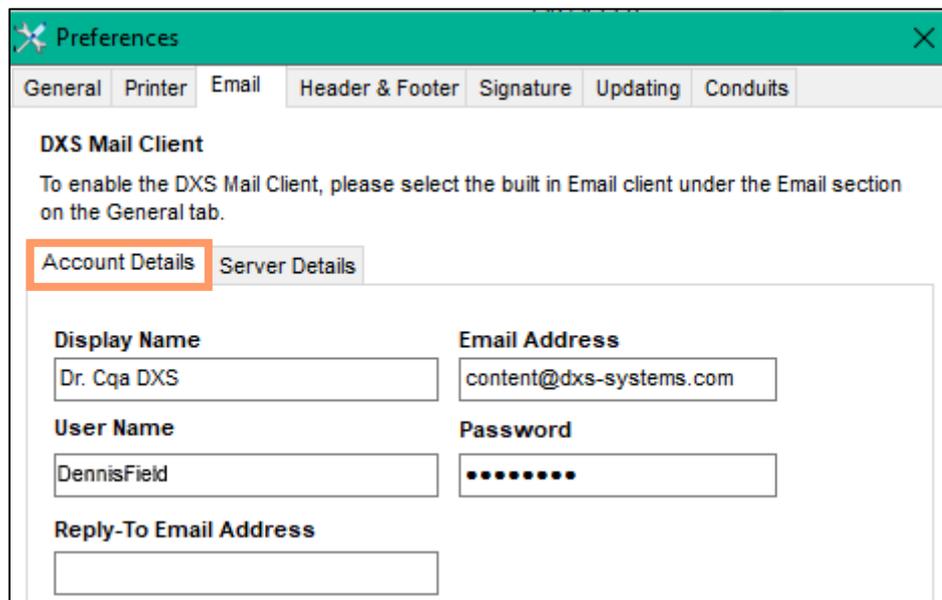
Figure 8: Account Details Tab

9. Please enter the following details into the relevant text boxes:
    Email Address: Enter your NHS email address
    User Name: Enter your NHS email address
    Password: Enter the required password. Remember to update this section when the password expires
10. **Reply-to Email Address**: If replies are to be sent to an alternative mailbox, enter the alternative email address.

11. Next, click on the "Server Details" tab.
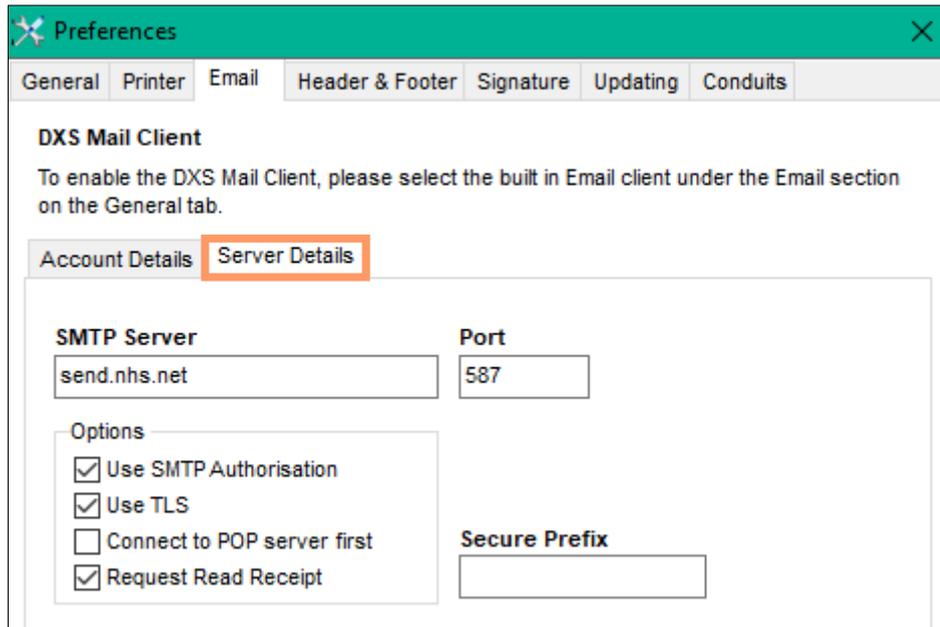
Figure 9: Server Details Tab

12. **NHS Mail:** The default "Server Details", such as the SMTP Server, etc., have already been entered for a standard @nhs.net email account. There is no need to change these settings.

13. **Please note:** If you wish to use another type of email account, please contact your IT lead at the practice, CSU or CTP (Commercial Third Party), who should know what settings to input in order to comply with NHS Mail requirements for transfer of PID.

14. **Request Read Receipt**: The "Request Read Receipt" option for all emails is switched on by default. You can turn it off by unticking the "Request Read Receipt" checkbox (see image below).

Figure 10: Requesting a Read Receipt

15. **Secure Prefix**: If you would like all email Subject lines to have a Secure Prefix to encrypt all emails, please enter the relevant text in the "Secure Prefix" textbox (see image above). Please contact your IT lead at the practice, CSU or CTP (Commercial Third Party) who should know what text to input.

16. Please confirm that all the settings are correct and click "Ok" to apply them.

2.2   Practice-wide using a generic practice NHS email account

As a DXS System Administrator, you must complete the setup of the built-in email client with a practice-wide generic NHS email address. With DXS System Administrator rights you will be able to enter the new password for the DXS email client practice-wide from your workstation. You will not be required to enter the new password for each individual user.

1. Click on the "DXS Home" button.

Figure 11: Home Button on the DXS Toolbar

2. Click on "Options".

Figure 12: Options Button on the DXS Home Page

3. On the drop-down menu, select "Preferences".
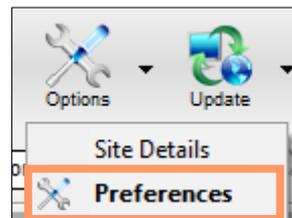
Figure 13: Preferences Button on Drop-down Menu

4. Click on the "General" tab.

Figure 14: General Tab

5. Scroll down to the "Email Client" section.
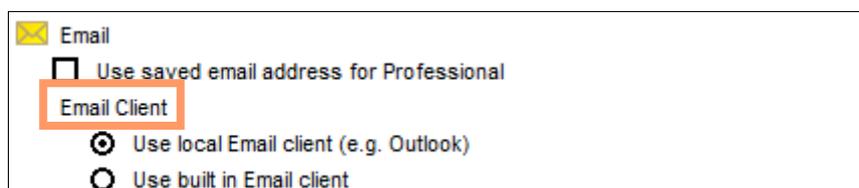
Figure 15: Email Client Section

6. Click in the circle to choose the "Use built in Email client" option.
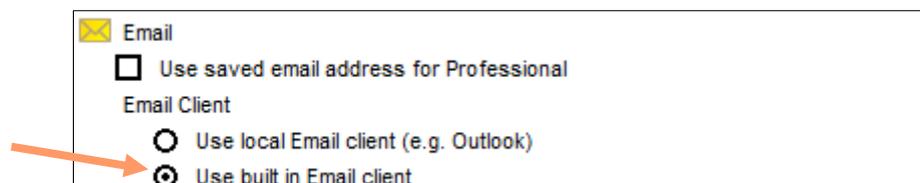
Figure 16: "Use Built-in Email Client" Option

7. Then click on the "Email" tab.

Figure 17: Email Tab

8. You will be shown the "Account Details" tab.
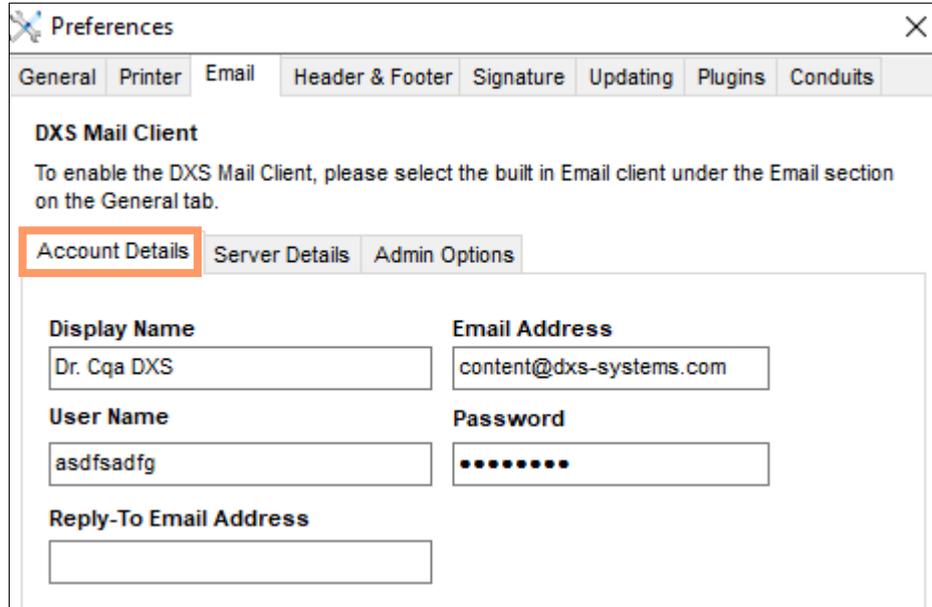
Figure 18: Account Details Tab

9. Please enter the following details into the relevant text boxes:
    Email Address: Enter the practice-wide generic NHS mail address
    User Name: Enter the practice-wide generic NHS email address or an authorised user's NHS email address*
    Password: Enter the required password. Remember to update this section when the password expires
    *An authorized user's NHS email address, refers to someone who can access the generic email account from their own email account e.g. Practice Manager/Medical Secretary
10. **Reply-to Email Address**: If replies are to be sent to an alternative mailbox, enter the alternative email address.

11. Next, click on the "Server Details" tab.

Figure 19: Server Details Tab

12. **NHS Mail:** The default "Server Details", such as the SMTP Server, etc., have already been entered for a standard @nhs.net email account. There is no need to change these settings.

13. **Please note:** If you wish to use another type of email account, please contact your IT lead at the practice, CSU or CTP (Commercial Third Party), who should know what settings to input in order to comply with NHS Mail requirements for transfer of PID.

14. **Request Read Receipt**: The "Request Read Receipt" option for all emails is switched on by default. You can turn it off by unticking the "Request Read Receipt" checkbox (see image below).

Figure 20: Requesting a Read Receipt

15. **Secure Prefix**: If you would like all email Subject lines to have a Secure Prefix to encrypt all emails, please enter the relevant text in the "Secure Prefix" textbox (see image above). Please contact your IT lead at the practice, CSU or CTP (Commercial Third Party) who should know what text to input.

16. **Practice-wide Settings**: Please click on the "Admin Options" tab. This tab is only visible to the DXS Systems Administrator at the practice.
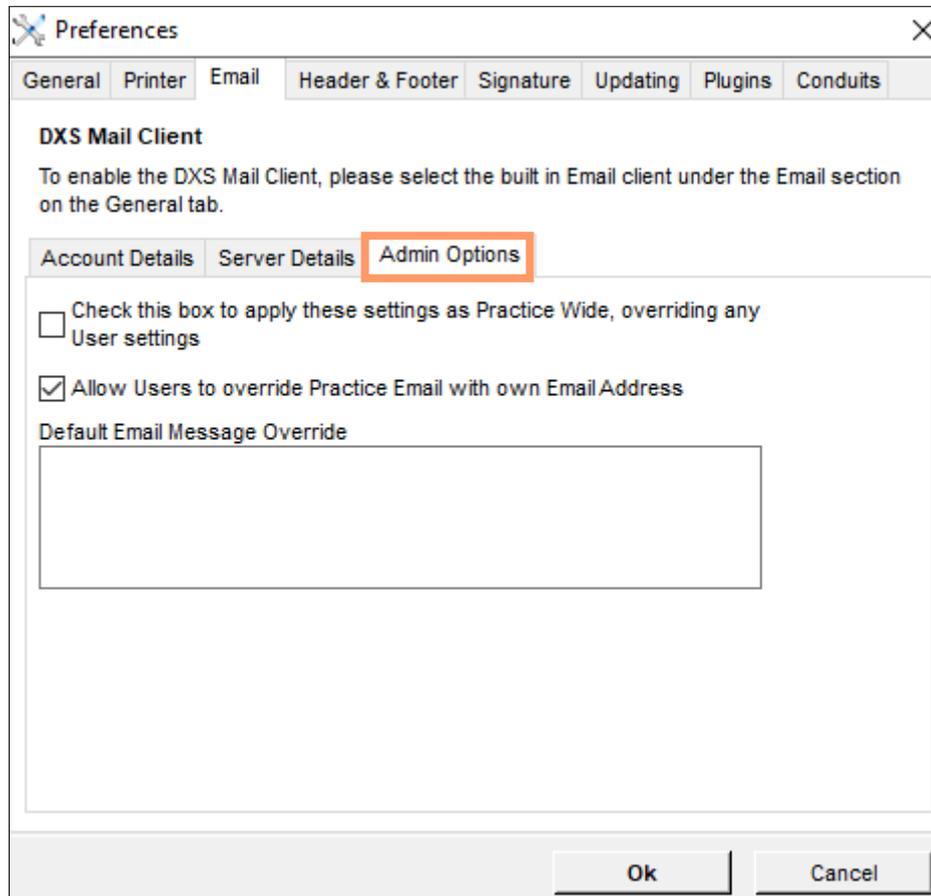
Figure 21: Admin Options Tab

Note: If you cannot see this tab, please contact our Support Desk

17. To prevent other users from changing the settings you have entered, please untick the "Allow Users to override…" checkbox.

18. Should you wish to change the wording of the default message sent with every email, enter the preferred text in the "Default Email Message Override" text box. If left blank, the user's own default message will apply.

19. In order to apply the changes you have made practice wide, tick the "Check this box to apply these settings as Practice Wide…" option

20. To save these settings please click "Ok".

Please note: This checkbox will need to be ticked each time the practice email address password is changed

3. DXS Support

3.1 Problems?

If you are having any problems regarding setting up the DXS email client or experiencing any technical issues with DXS Point-of-Care, please get in touch with our service desk and one of the members of our team will be more than happy to help you.

✉ **support-uk@dxs-systems.com**
☎ **0800 028 0004** option 1

3.2 Service desk hours of operation

Monday–Friday	07:30–19:00
Saturday	09:00–13:00
Sunday	Closed

3.3 DXS Training

To view more DXS Training Guides visit our training website at http://training.dxs-systems.com/.