

Quick Reference to Mail Manager Setup

for XML Pathology and GP2GP

INPS

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Quick Reference to Mail Manager Set-up

What this Quick Reference Guide Covers

This Quick Reference guide is aimed at System Managers in practices in England, particularly those:

- who want to set up Mail Manager to receive and manage pathology messages in XML format. Note that many other XML messages can also be received in Mail Manager (Out of Hours Reports, ETP, PDS Updates, etc).
- who are receiving GP2GP messages.

Before Mail Manager is used for XML Pathology, a System Administrator should configure the following set-up options in Control Panel:

- Staff Access (see page 4)
- Actions (see page 9)
- Action Status (see page 14)
- Staff Groups (see page 17)

We have also included instructions on how to archive messages in your individual Mail Manager Mailbox and on behalf of other users.

Other Mail Manager User Guides include:

- Quick Reference to Mail Manager for Administrative Staff;
- Quick Reference to Mail Manager for Clinical Staff;
- **Chapter 5** (version 7, 04/12/07) of the **Vision 3 Training Guide**, which can be downloaded from the INPS website www.inps.co.uk from the Training section.
- **On-screen help** within the Mail Manager module.

All the Quick Reference Guides are provided by INPS Training on the Training CD for Mail Manager and GP2GP. A full GP2GP v1.1 User Guide can be downloaded from the INPS website www.inps.co.uk under Client Zone - Downloads - CfH - GP2GP.

Switching on XML Pathology – General Points

- Your pathology laboratory should be sending EDIFACT messages which you have been receiving successfully into Mailbox / Mail Administrator. EDIFACT messages will be "wrapped" in an "XML envelope".
- XML Pathology has to be switched on. You will be given help with this.
- There is no conversion of existing old pathology messages in Mail Administrator / Mailbox, so there will be a transitional period during which you will require both old and XML pathology. Once XML pathology has been activated, all new pathology messages will be routed into Mail Manager, but you will have to manually process any outstanding messages in Mail Administrator / Mailbox.
- There is no change to the function of incoming pathology messages in GPC.
- Actions, mapping Read codes and Local IDs that you were using in Mail Administrator can be converted into Mail Manager and need not be re-entered. The first time you enter Mail Manager after XML Pathology has been switched on, you will be asked if you want to convert the action messages, the Read code Look-up table and Local ID table from Mailbox / Mail Administrator. Answering Yes will save you a lot of time from re-entering these.

Pre-checks before starting GP2GP

Organisations

Before starting GP2GP, check in **Control Panel - File Maintenance** under **Organisations** that you do not have an organisation with the same name as the practice.

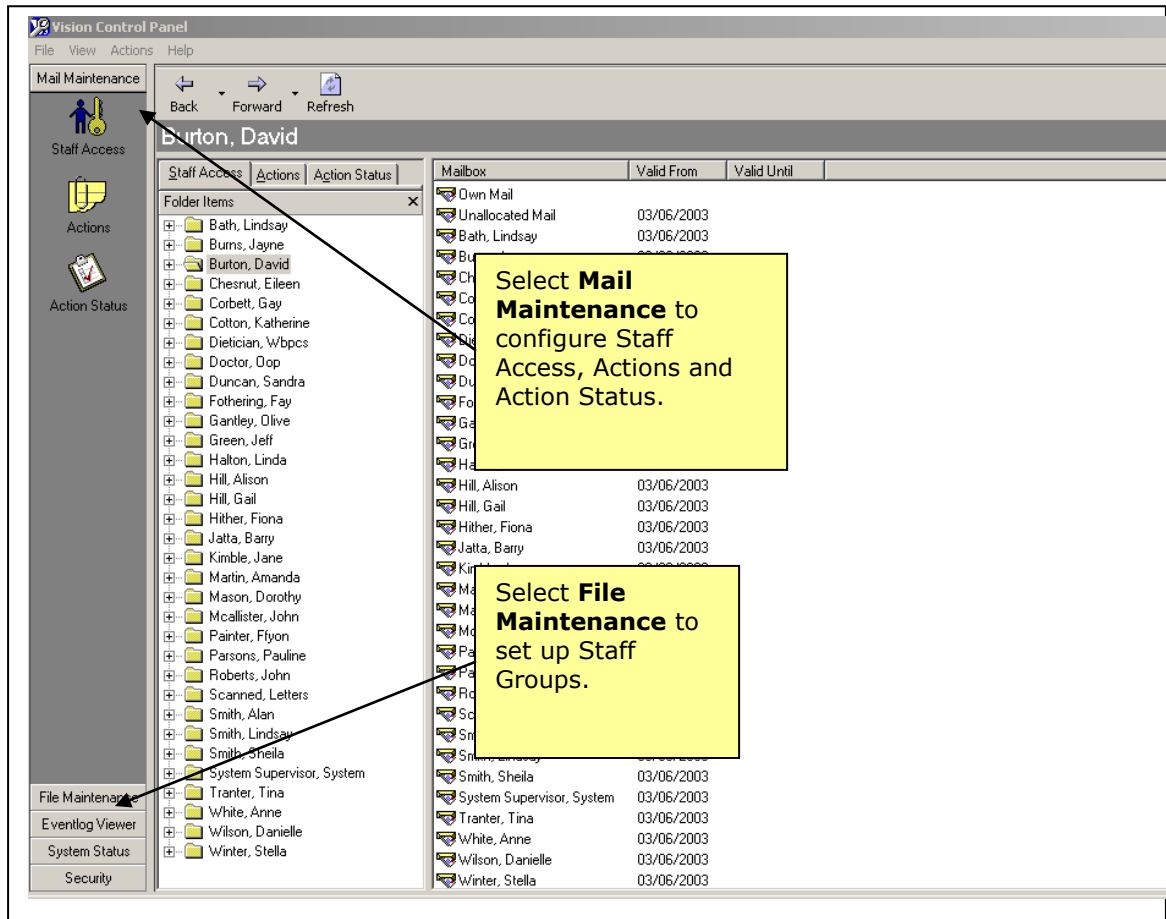
For example, the practice may be called The Medical Centre, but you also have an Organisation under General Practitioner Fundholder called The Medical Centre.

In this case, when trying to send a GP2GP extract with a referral in it with the organisation / hospital being the Fundholder, GP2GP cannot distinguish which organisation the department is linked to so the hospital is not sent through and is missing from the referral screen at the receiving practice.

So if there are ANY duplicate names within Organisations, change one of them. In the example above, the General Practitioner Fundholder name could be changed to The Medical Centreold.

Mail Manager Set-up in Control Panel

From the Vision front menu, select **Management Tools - Control Panel**.



The following procedures should be followed to set up Mail Manager:

- Set up staff access rights to view other peoples' mail messages in **Mail Maintenance - Staff Access** - See page 4.
- Create/Maintain the list of action messages in **Mail Maintenance - Actions**, e.g. *Patient to make appointment*. See page 9
- Create/maintain the list of action status in **Mail Maintenance - Action Status**. New status might include *In Progress* or *Awaiting patient response*. See page 14.
- Create/maintain staff groups in **File Maintenance - Staff Groups**, e.g. receptionists, nurses, GPs etc. These user-defined groups of practice staff members can be selected for the purposes of copying or actioning messages en masse in Mail Manager. See page 17.

Mail Maintenance - Staff Access

Staff Access allows for viewing and maintenance of staff access rights. Everyone has access to their own mail only, unless they are given extra access rights to other staff members by a System Administrator. The System Administrator will need access to everyone's mail and also unallocated mail (i.e. messages that have not been allocated to a member of staff).

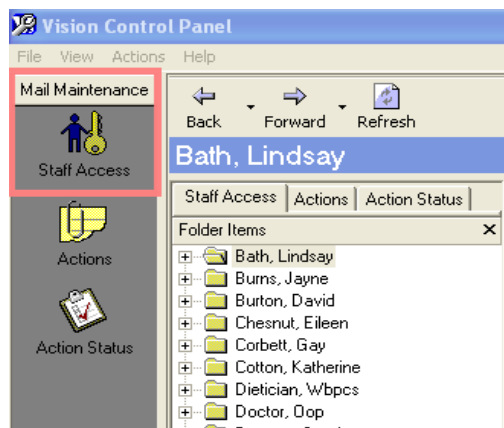
It is also recommended that two other Administrative staff are given access to view unallocated mail as well as the System Manager.

During an absence there is no need to redirect mail within Mail Manager. You are simply able to give another user the rights to view mail for the period of the staff absence.

Whose messages can the selected user view?

In **Control Panel - Mail Maintenance - Staff Access**, when you select a Mailbox from the Folder list, the Mailboxes that the staff member has access to will be displayed.

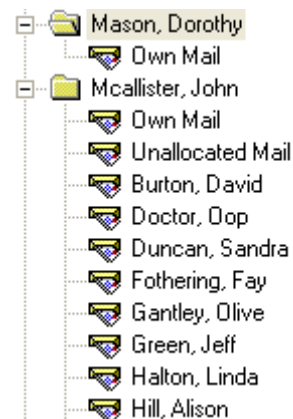
1. Go to the front screen of Vision and select **Management Tools – Control Panel**.
2. Select **Mail Maintenance – Staff Access**.



3. By clicking on a folder, you can see whose messages each member of staff has access to.

Dorothy Mason can only see her own mail.

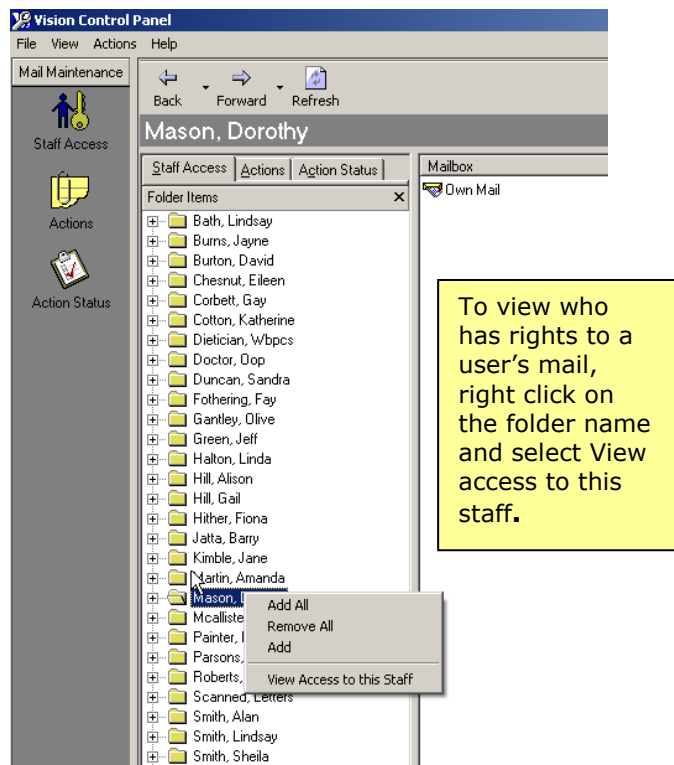
John Mcallister has rights to view unallocated mail and the mail of several members of staff.



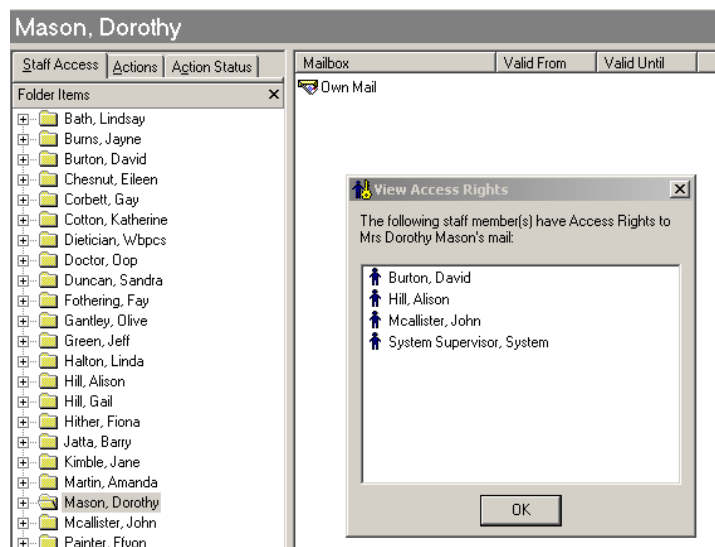
Who has access to the selected mailbox?

Similarly, if you would like to find out all the users who can access a particular Mailbox without looking at each individual user's access rights you can:

1. Right click on a Mailbox folder and select **View access to this staff.**



2. The **View Access Rights** pane will display the names of the users who have access rights to Dorothy Mason's mail.

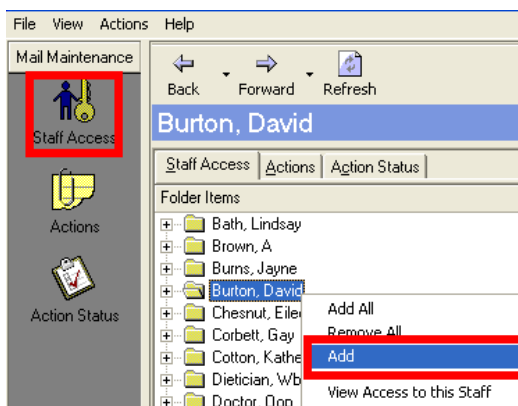


3. Click **OK** to close.

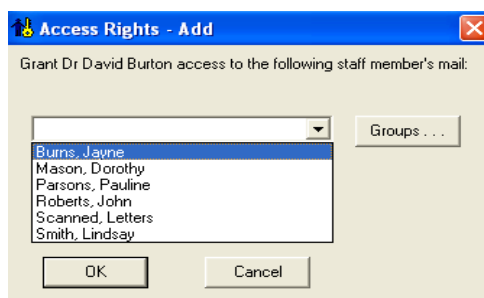
Allowing Access to Messages

Also in **Control Panel - Mail Maintenance - Staff Access** you are able to manage which messages users are allowed access to. To allow a particular user to be able to access another users' messages:

1. From the **Staff Access** list, right click on the folder of the person you wish to give further access rights and select **Add**.

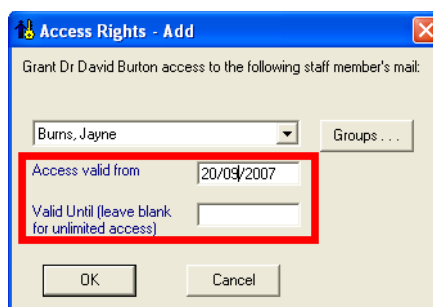


2. From the drop down list select the person whose messages you would like to grant access to.



Note You can also give access rights to a group of users messages (i.e. Doctors, Nurses see page 18 for further instructions on setting up groups).

3. To allow unlimited access, leave the Valid Until field blank.



Unlimited access to messages

If you only want to allow temporary access (i.e. when someone is on holiday), you should fill in the Valid Until date.



Allowing temporary access to messages

4. Click **OK** to save. You can see that David Burton has access to Jayne Burns' Mailbox from 20/09/2007 until 01/10/2007.

Staff Access	Actions	Action Status	Mailbox	Valid From	Valid Until
			Down Mail		
			Unallocated Mail	03/06/2003	
			Bath, Lindsay	03/06/2003	
			Burns, Jayne	20/09/2007	01/10/2007
			Chesnut, Eileen	03/06/2003	
			Chesnut, Eileen	03/06/2003	

5. From the Mail Manager screen, you are able to distinguish your own messages by looking at the staff column.

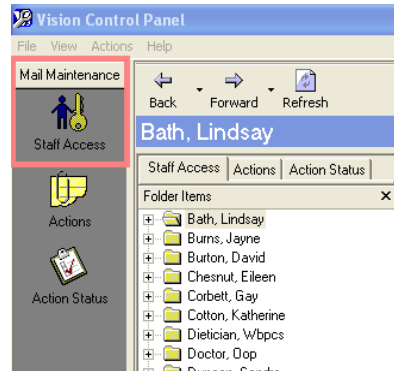
Status	Type	Read	Date	Staff
Filed	Serum	<input type="checkbox"/>	09/11/2007 ...	Burns, Jayne
Partially filed	Citrate	<input type="checkbox"/>	18/10/2007 ...	Burton, David
Partially filed	Serum	<input type="checkbox"/>	18/10/2007 ...	Burton, David

Note If you click on the staff heading, the messages will be sorted alphabetically by allocated staff.

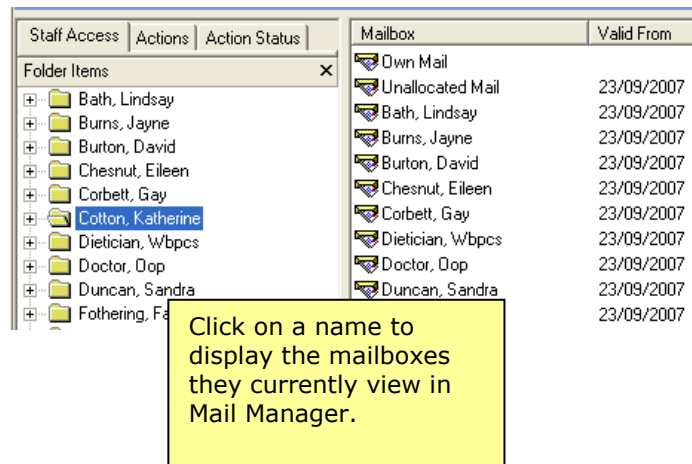
Remove Mailbox from Mail Manager View.

You can remove other users' Mailboxes from appearing in your Mail Manager view by removing your rights to their messages in Control Panel.

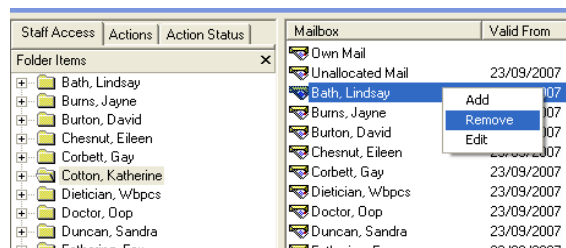
1. From **Control Panel - Mail Maintenance** select **Staff Access**



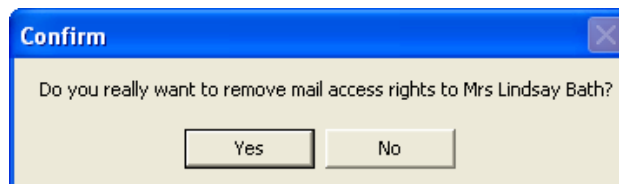
2. Click on the Mailbox you would like to amend access rights to which should display all the Mailboxes they currently have rights to see in Mail Manager. In this example, we are going to edit Katherine Cotton's access rights so that she no longer views Lindsay Bath in her Mail Manager screen.



3. Right click on the mailbox of the person's messages to be removed, i.e. Lindsay Bath, and select Remove.



4. You will be prompted with the following message: *Do you really want to remove mail access rights to Mrs Lyndsay Bath?* Select Yes to remove.



5. Lyndsay Bath's messages will no longer be available to view by Katherine Cotton.

Mail Maintenance - Action

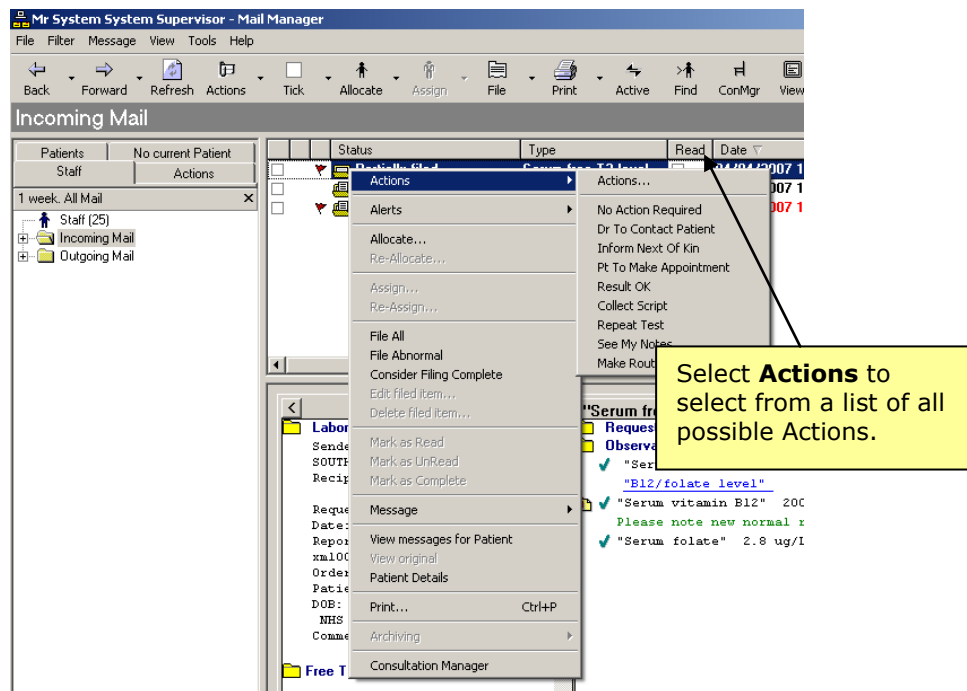
- Actions are created and maintained in **Control Panel – Mail Maintenance – Actions**. When you first go into Mail Manager after switching XML Pathology on, you will be prompted automatically if you would like the Actions used in the previous Mailbox / Mail Administrator to be converted into Mail Manager.

The contents and display order of the Actions list is maintainable by you in Mail Maintenance as are the Action Status codes (see page 14) which track the course of an action.

In Mail Maintenance, you can define actions into two lists: **Frequent Actions**, where you can determine the order, and **Additional Actions**. Actions you no longer need are placed in **Discontinued Actions**.

Note that you cannot add actions to GP2GP messages. Until you are using other XML messages such as pathology, this section is not relevant.

Initially the most frequently used actions are presented in a list in Mail Manager when you right click on a message and select Actions. Once on the Add Action screen, you can select from the full list of Frequent and Additional Actions.

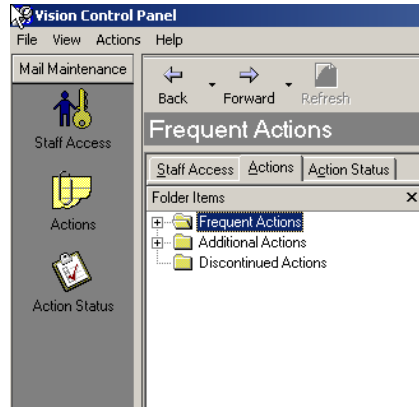


How messages are actioned from Mail Manager

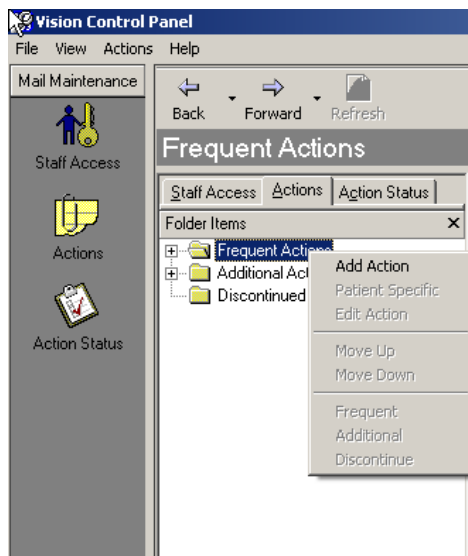
To create an action in Control Panel

To add an action which will be available for selection when messages are being processed:

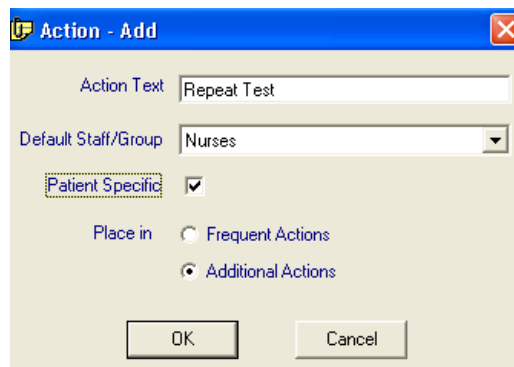
1. In **Control Panel - Mail Maintenance**, select **Actions**.



2. Right click on either **Frequent Actions** heading or **Additional Actions** heading, depending on what kind of action you would like to add, and select **Add action**.



3. This displays the **Action - Add** screen.

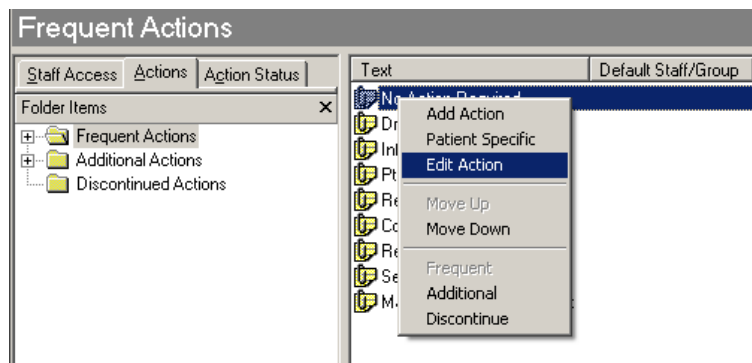


4. **Action Text:** Type the text of the message. Here are some suggested action messages:
- | | |
|---------------------------|-----------------------------------|
| No Action Required | Repeat test |
| Pt to make appointment | See my notes |
| Dr to contact patient | Continue treatment |
| Patient to collect script | Notes to GP |
| Result OK | Set up a recall |
| Schedule a home visit | Review Medication |
| Add Read code | Phone patient - no further action |
5. **Default Staff/Group:** This lists all the staff and staff groups. This is optional, but you can assign this particular action always to be dealt with by a particular group (eg receptionists) or member of staff (eg, phlebotomist). This saves having to select an individual or group in the **Action By** field every time you add an action (see page 17 for Staff Groups). Note that some practices find it an advantage to put one member of staff for specific types of messages (eg OOH) in Default Staff/Group, as assigning the action to a group can lead to everyone seeing it and no-one dealing with it.
6. **Patient specific:** By default, the patient-specific flag is ticked as most actions involve a patient-related activity, such as *Make an appointment*. Examples of non patient-specific actions would be *"Not sure which Jones this is, please check"* or *"Please check with lab that we've received all the results for today"*. If a message has been actioned with a patient specific action, if you try to reallocate the message to another patient you will be warned that there are actions that have already been assigned to the patient.
7. You must also decide if the created action belongs to either **Frequent Actions** or **Additional Actions**, depending on the context from which it was selected. Frequent Actions are displayed more easily when adding an action.
8. Select OK to save the action.

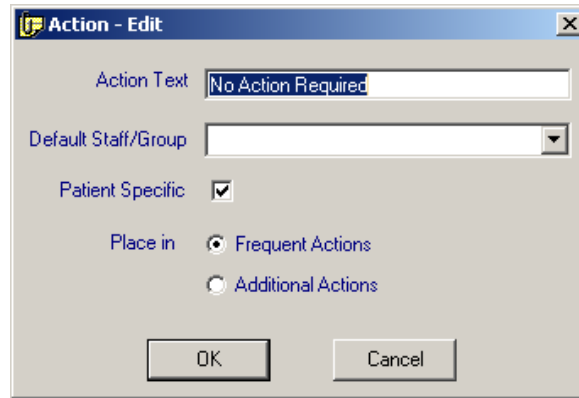
To edit an action

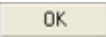
To edit and action:

1. Find the action in the Frequent or Additional actions folders. Right mouse click on the action to edit and select **Edit Action**.



2. You can now change any of the details on the action screen.



3. Click OK  to save the changes.

Change the list order or Frequent Actions

For frequent actions only, you can change the order they appear for selection. To do this:

1. In the **Actions** tab in **Control Panel**, select the **Frequent Actions** folder:

Text	Default Staff/Group	Patient-Specific	Display Order	Created/Edited	Edited By
No Action Required		Y	1	24/02/2003	DR MCAL...
Dr To Contact Patient		Y	2	03/08/2004	DR ALIS...
Inform Next Of Kin		Y	3	03/08/2004	DR ALIS...
Pt To Make Appointment		Y	4	24/02/2003	DR MCAL...
Result OK		N	5	14/01/2007	SYS
Collect Script		N	6	14/01/2007	SYS
Repeat Test				14/01/2007	SYS
See My Notes				14/01/2007	SYS
Make Routine Appointment				14/01/2007	SYS

2. Right click on the action to be moved and select either **Move Up** or **Move Down**:

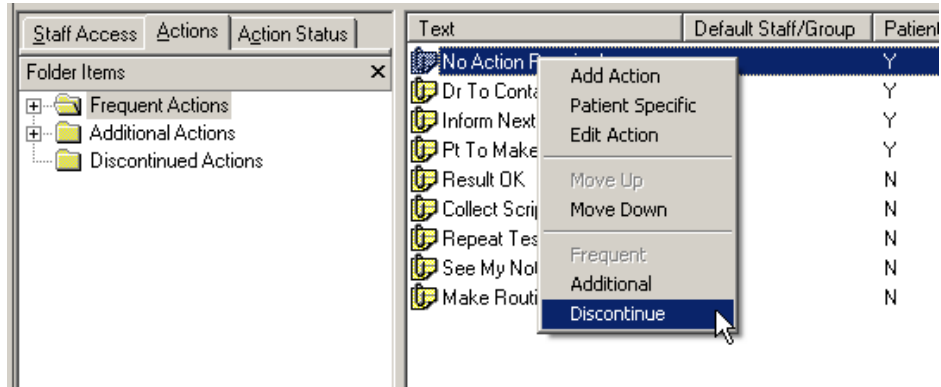
Text	Default Staff/Group	Patient-Specific	Display Order
Dr To Contact Patient		Y	1
Inform Next Of Kin		Y	2
No Action Required			3
Pt To Make Appointment			
Result OK			
Collect Script			
Repeat Test			
See My Notes			
Make Routine Appointment			

Discontinue an action

Since actions are designed to be searchable in the audit trail, it is not possible to delete an action. Instead actions can be marked as Discontinued.

To discontinue an action and prevent it appearing in the Action selection list in Mail Manager:

1. Right mouse click on an action in **Frequent Actions**, select **Discontinue**:



The action will now be in the discontinued folder and not available for selection from Mail Manager.

Mail Maintenance - Action Status

Action Status relate to the progress of actions and are implemented in a similar way to action codes. For example, a receptionist might select the action status of "Patient not available" if she/he was unable to contact the patient. The Action Status is maintained in **Control Panel – Mail Maintenance – Action Status**.

There are two folders where Action Status can be recorded:

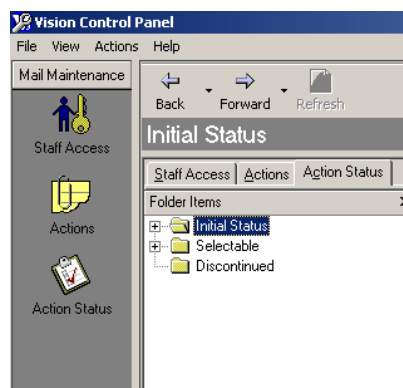
- Initial Status** – There is only one action status allowed in here which is normally *Newly Actioned*. This action status is given newly actioned messages by default.
- Selectable** - The Selectable action status is manually picked by the user when required as the status of the message changes (e.g. Awaiting Patient Contact or Completed Action).

Note Some practices might not wish to use the selectable action status functionality at all.

Create an Action Status

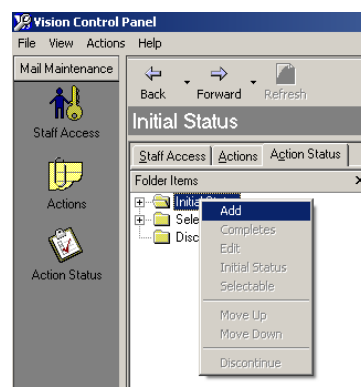
To add an action status:

1. In Control Panel - Mail Maintenance, select the Action Status tab.

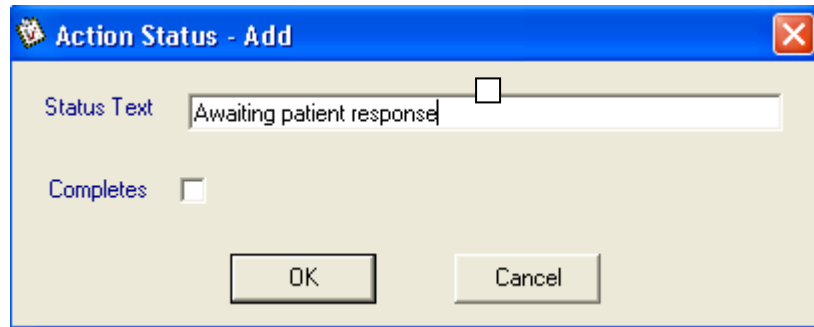


In Control Panel – Mail Maintenance, select the Action Status tab.

2. Right click on **Initial Status** or **Selectable** folder and select **Add**.



- The **Add Action Status** screen is displayed.



- Status Text** - Type in the wording of the status code. For example, under Initial Status, a status code of Newly Actioned. Or under Selectable, a status code of Complete. By default the Completes checkbox is unchecked.

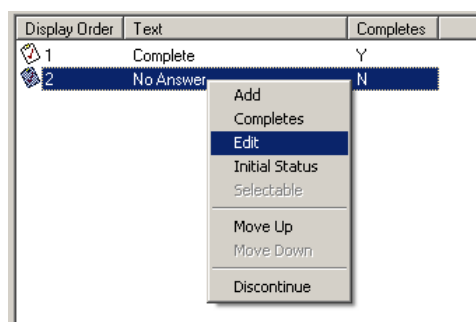
Action Status	Whether completes the action
Deferred	No
Called patient - no reply	No
In hand	No
Awaiting laboratory response	No
Completed successfully	Yes
Appointment made	Yes
Unable to complete	No

- Completes** - Each action status can be either outstanding or complete. If the Completes flag is set on the status code, then the action will automatically be completed. Note that *Completed* does not necessarily mean completed successfully and numerous status codes may mark an action as complete even though it has not been successfully performed.
- Click **OK**.

Edit an Action Status

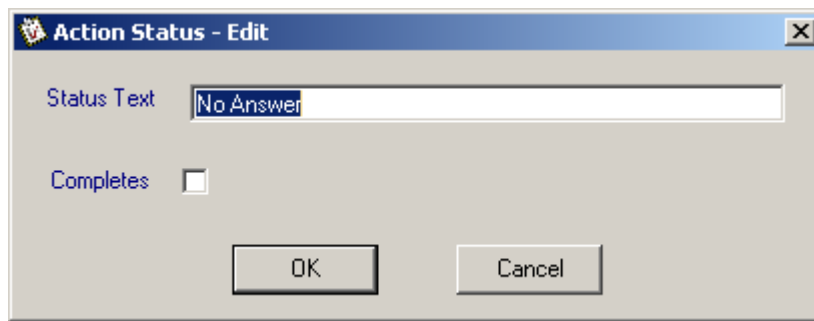
To edit an Action Status:

- Right click on an **Action Status** and select **Edit**.



- Amend any of the fields.

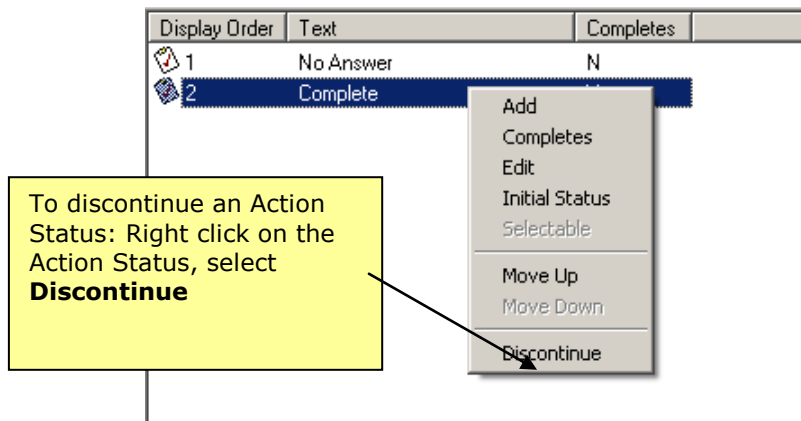
3. Click **OK** to save.



Discontinue an Action Status

To discontinue an action and prevent it appearing in the Action selection list in Mail Manager:

1. Right mouse click on an action in **Frequent Actions**.
2. Select Discontinue:



The action will now be in the discontinued folder and not available for selection from Mail Manager.

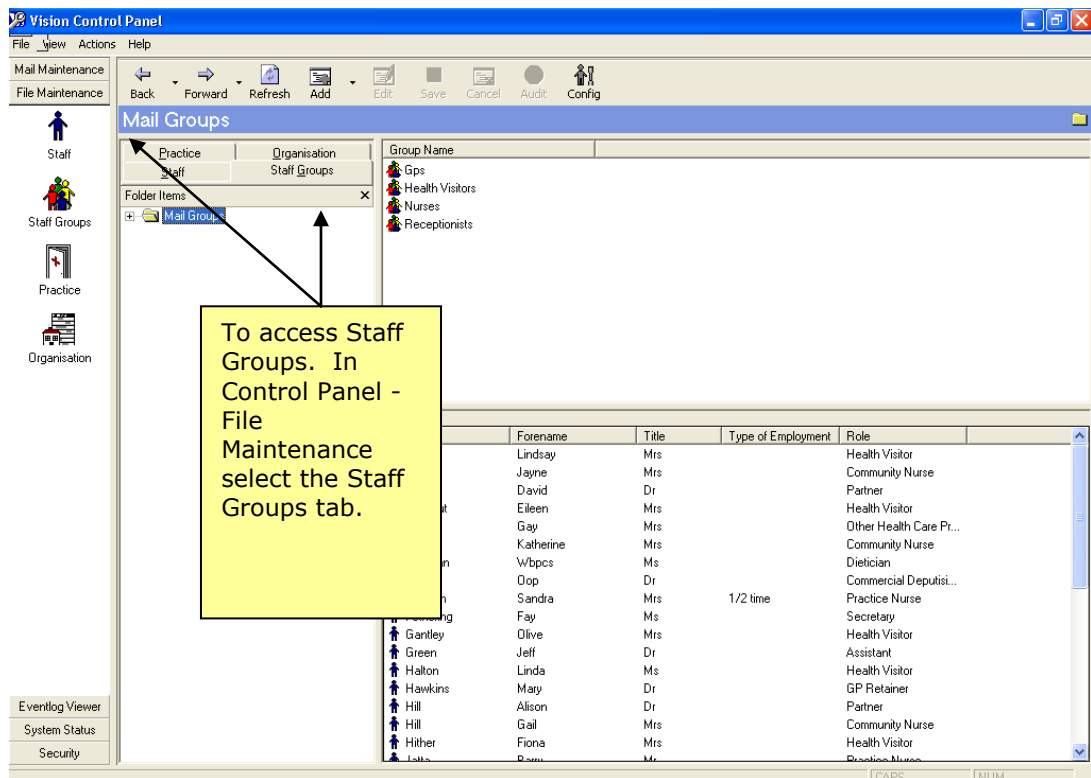
File Maintenance - Staff Groups

What are Staff Groups?




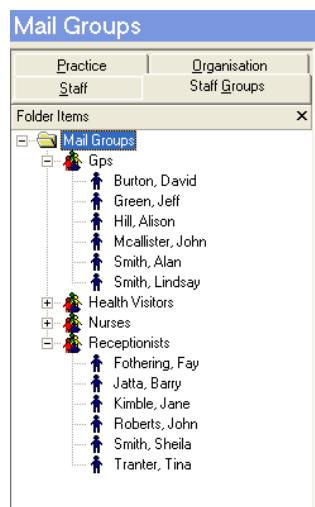
Staff Groups

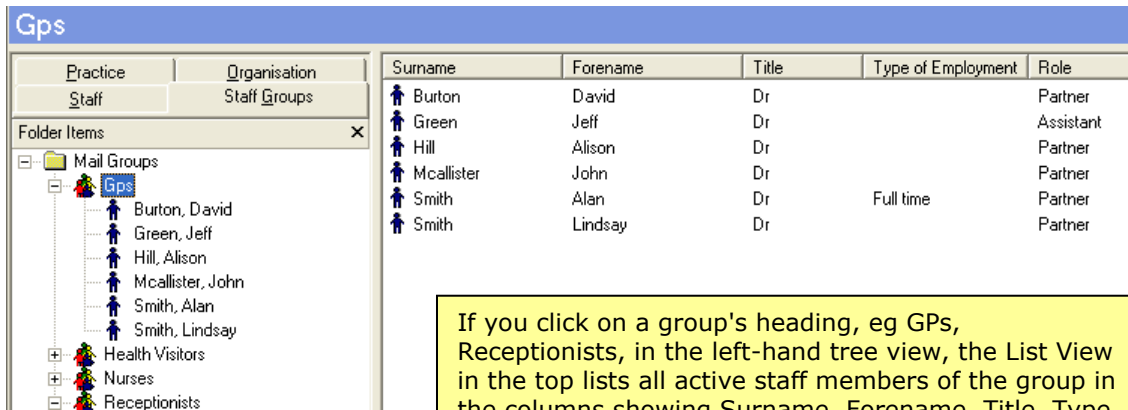
Staff Groups are user-defined groups of practice staff members that can be selected en masse, for the purposes of copying or actioning messages (Action By) in Mail Manager; for instance, a staff group of Receptionists, or of GPs, or Health Visitors.



To access Staff Groups. In Control Panel - File Maintenance select the Staff Groups tab.

On selection of the Staff Groups, the tree view shows all the currently defined Staff groups at the root level. Click on  beside a Group heading to show all the members of the group.





If you click on a group's heading, eg GPs, Receptionists, in the left-hand tree view, the List View in the top lists all active staff members of the group in the columns showing Surname, Forename, Title, Type of Employment and Role. The bottom right pane has a list of All Staff.

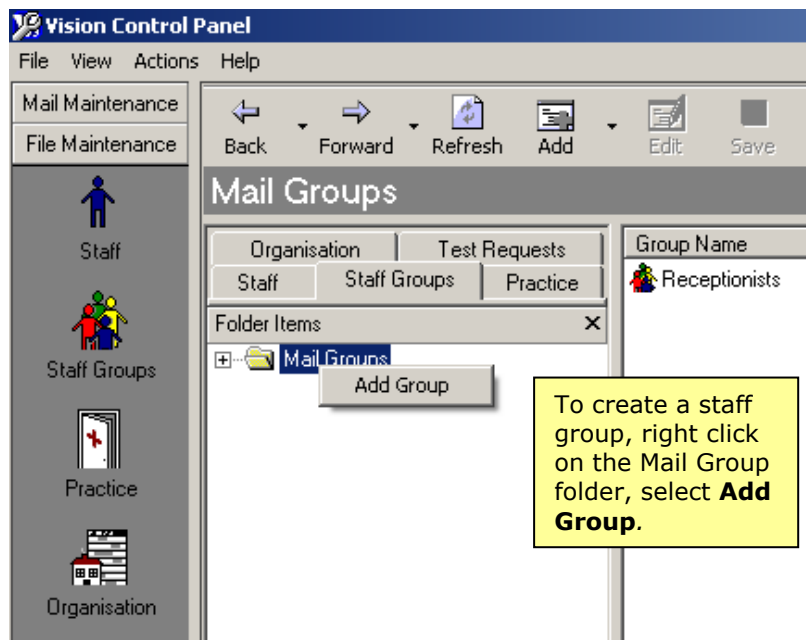
All columns are sortable - click on the column header (eg Surname, Role etc) which sorts in ascending or descending order.

Note The Staff Groups facility in Control Panel is only available once the Mail Manager / Mail Maintenance features are switched on. Prior to that, the Staff Groups tab is hidden.

Create a Group

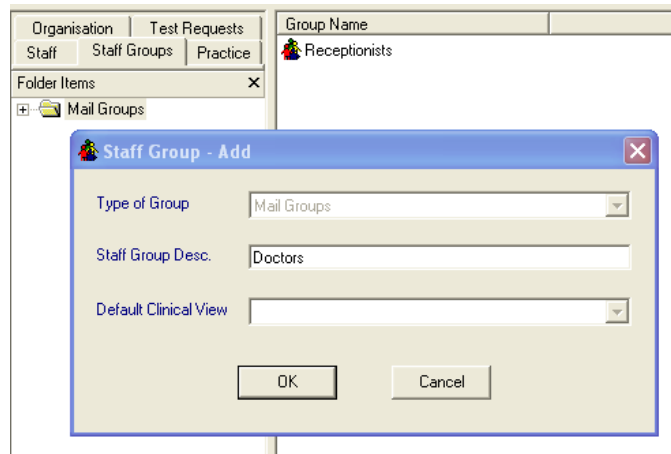
To create a group:

1. In **Control Panel – File Maintenance – Staff Groups**, right click on **Mail Groups** at the top of the left-hand tree view, select **Add Group**:

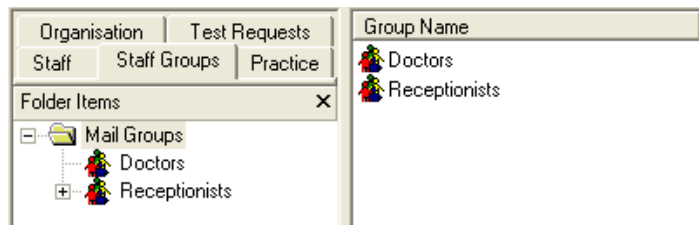


To create a staff group, right click on the Mail Group folder, select **Add Group**.

2. On the **Staff Group - Add** screen, the **Type of Group** defaults to **Mail Groups** and is non editable. Type in a suitable **Staff Group Description**, e.g. GPs, Health Visitors, All clinical staff except GPs.



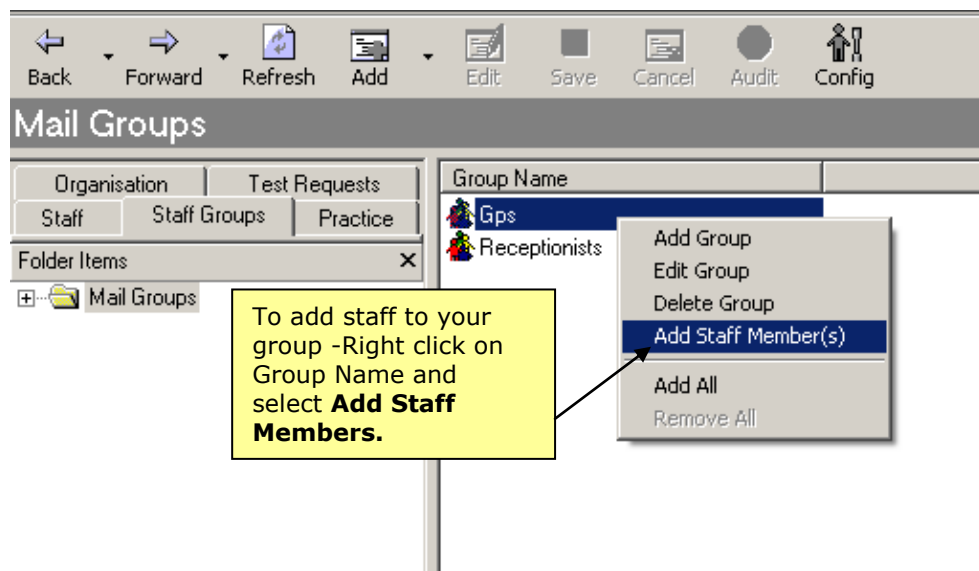
3. Click OK to save. The group will appear under the Mail Groups folder



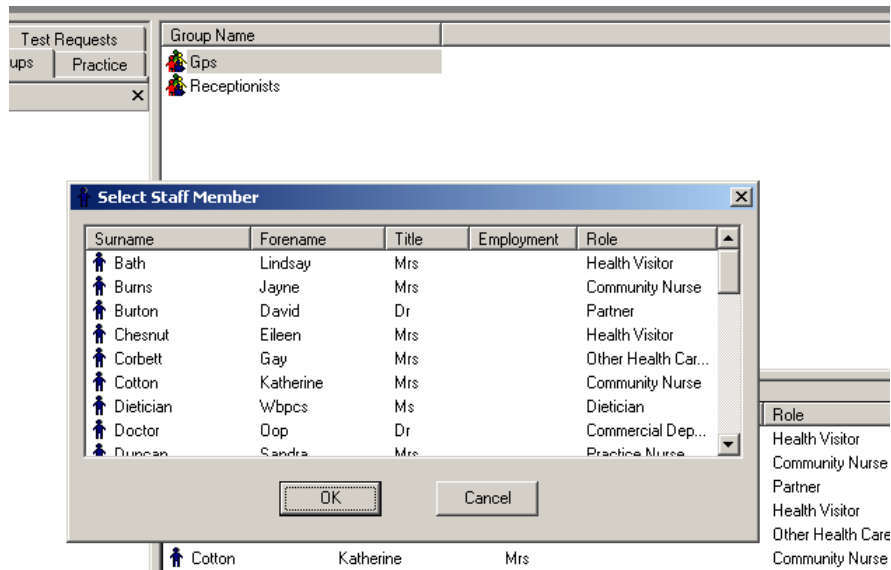
Add person(s) to a Group

Once you have created a Staff Group you can add Staff members:

1. Right click on a group heading, e.g. Nurses, and select **Add Staff Member(s)**



2. From the **Select Staff Member** window – select the staff name to be added (or hold down the Control key to select multiple names) - click OK.

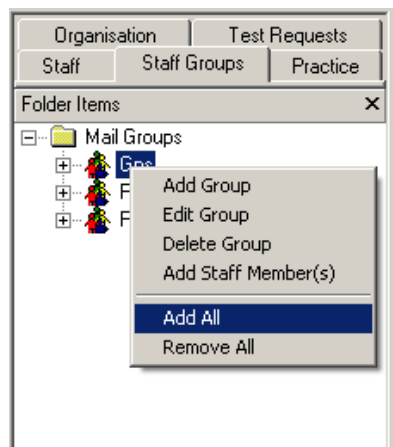


3. Click **OK** to save.

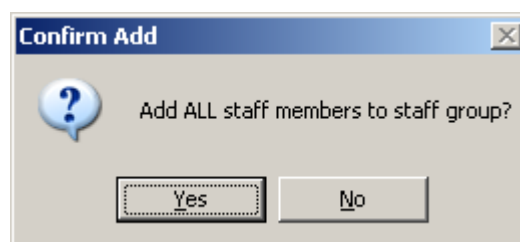
Add all staff to a group

To add every member of staff to a group:

1. Right click over the group heading, and select **Add All**.



2. Click Yes on the following prompt for all staff members to be added to the selected group.

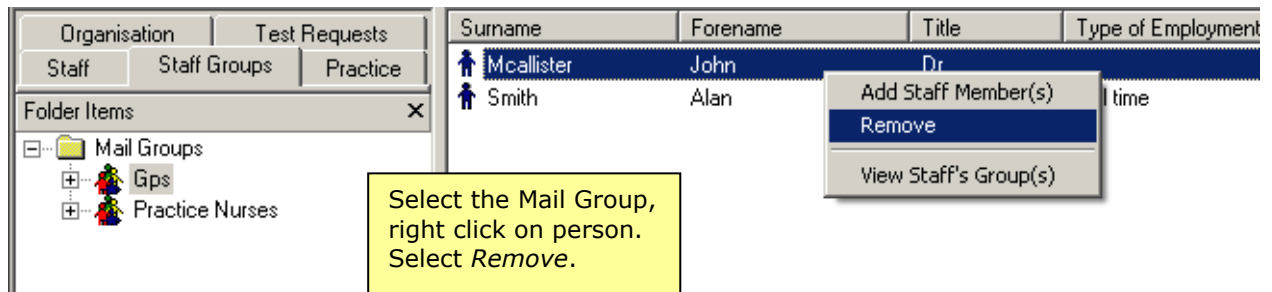


It might be an easier option to add all to a group and then remove individual staff you don't want in the group. See Remove a person from a group.

Remove a person from a group

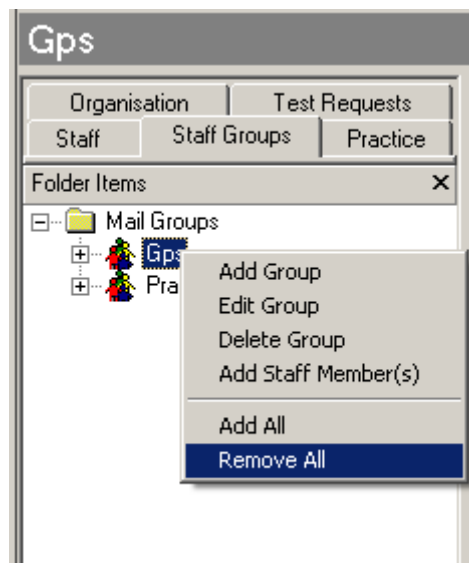
To remove an individual from a group:

1. Click on the Staff Group from Staff Groups in Control Panel – File Maintenance.
2. Right click on a staff name, and select Remove.

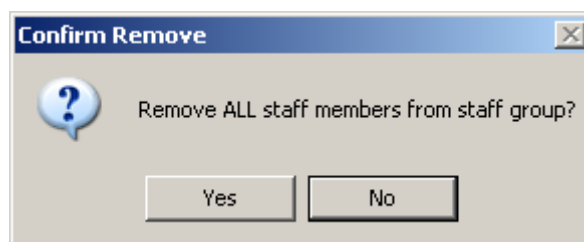


Remove all staff from a group

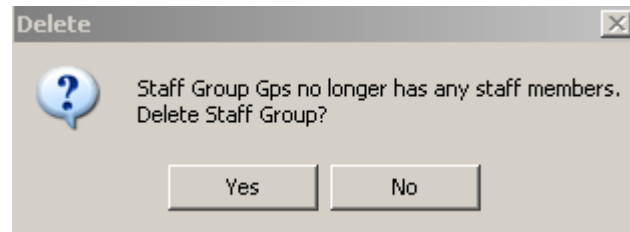
1. Right click while pointing to the group heading in the left-hand tree view, and select **Remove All**.



2. Click on Yes on the Confirm Remove screen: **Remove ALL staff members from staff group?** To remove all.



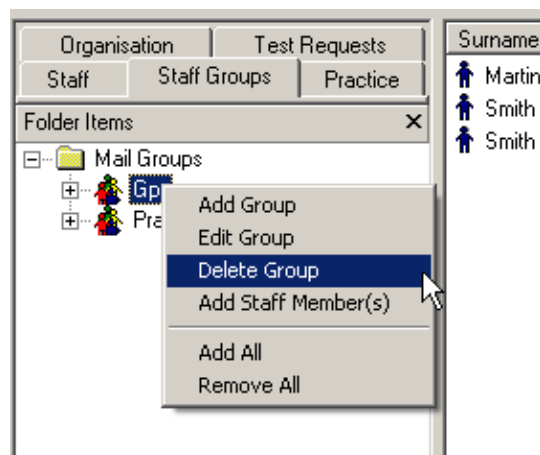
3. As this leaves the group empty, you are asked: *Staff Group Gps no longer has any staff members. Delete Staff Group?* Answering Yes deletes the group, but it is perfectly valid to answer No and leave an empty group between sessions as it may be needed subsequently.



Delete a Staff Group

To permanently delete a Staff Group:

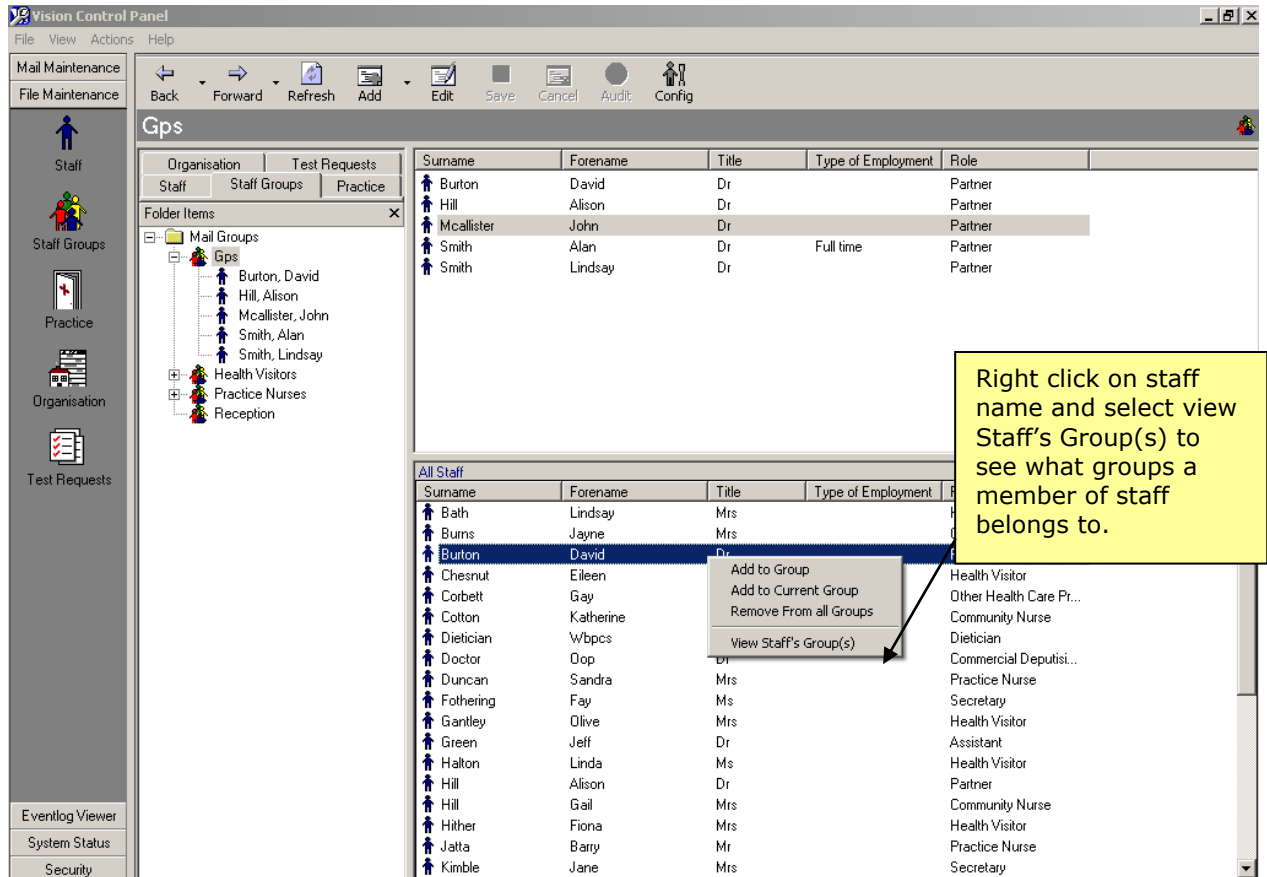
1. Right click on a group heading in the left-hand tree view of the Mail Group folder.
2. Select **Delete Group**.



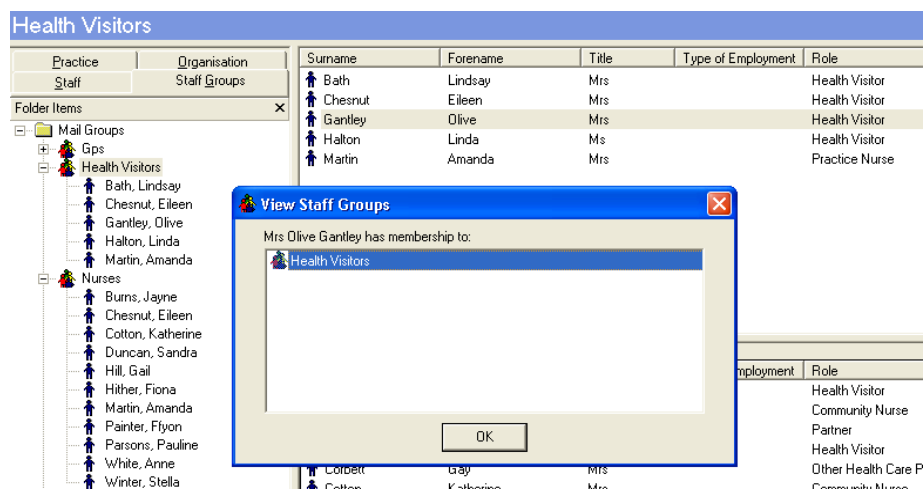
How do you find what other groups a Staff member belongs to?

To see what groups a staff member belongs to:

1. Right click on a staff name and select **View Staff's Groups**.



2. This lists all the groups to which the currently selected staff member belongs.



Remove a staff name from all groups

To remove a member of staff from all groups:

1. Right click on a staff member and select **Remove from all groups**. Their name will be removed from *all* groups.

The screenshot shows the Vision Control Panel interface. On the left is a navigation pane with icons for Staff, Staff Groups, Practice, Organisation, Test Requests, Eventlog Viewer, System Status, and Security. The main area is titled 'Gps' and contains a table of staff members. A context menu is open over the staff member 'Burton, David', with the option 'Remove From all Groups' highlighted. A yellow callout box with an arrow pointing to this option contains the text: 'To remove a member of staff from all groups right click and select **Remove from all Groups**.'

Surname	Forename	Title	Type of Employment	Role
Burton	David	Dr		Partner
Hill	Alison	Dr		Partner
Mcallister	John	Dr		Partner
Smith	Alan	Dr	Full time	Partner
Smith	Lindsay	Dr		Partner

Surname	Forename	Title	Type of Employment	Role
Bath	Lindsay	Mrs		Health Visitor
Burns	Jayne	Mrs		Community Nurse
Burton	David	Dr		Partner
Chesnut	Eileen			Health Visitor
Corbett	Gay			Other Health Care Pr...
				Community Nurse
				Dietician
				Commercial Deputisi...
				Practice Nurse
				Secretary
				Health Visitor
				Assistant
				Health Visitor
				Partner
				Community Nurse
				Health Visitor
				Practice Nurse
				Secretary

The staff member will now not belong to any groups.

Overview of Mail Manager

Accessing Mail Manager

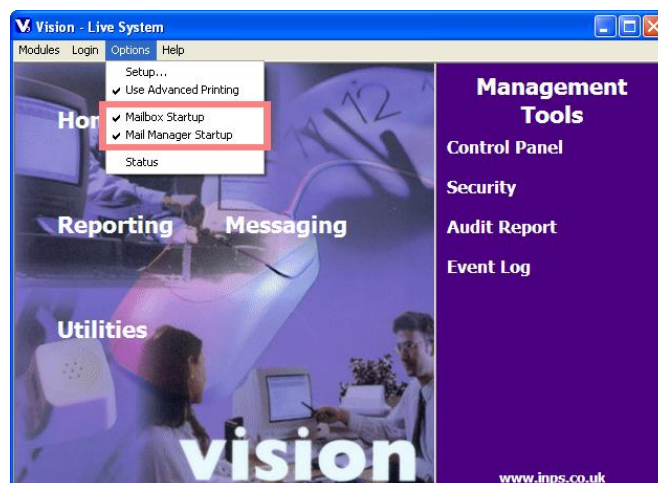
Mail Manager is accessed from the Messaging Menu on the front screen of Vision.



Startup option

There is also a **Mail Manager Startup** option which can be enabled from the Vision front menu under **Options - Mail Manager Startup**. This is a per user setting. Ticking this will automatically launch Mail Manager every time you log into Vision. You will see your mailbox and other mailboxes to which you have access rights.



As there will be a transitional period between switching from Mail Administrator / Mailbox to Mail Manager, it is advisable that, once you have switched Mail Manager on, you check that all the messages in your Mail Administrator/Mailbox have been dealt with. Once you are certain that you have dealt with such messages, you can disable the Mailbox start-up for Mail Administrator by selecting **Options - Mailbox Startup**.



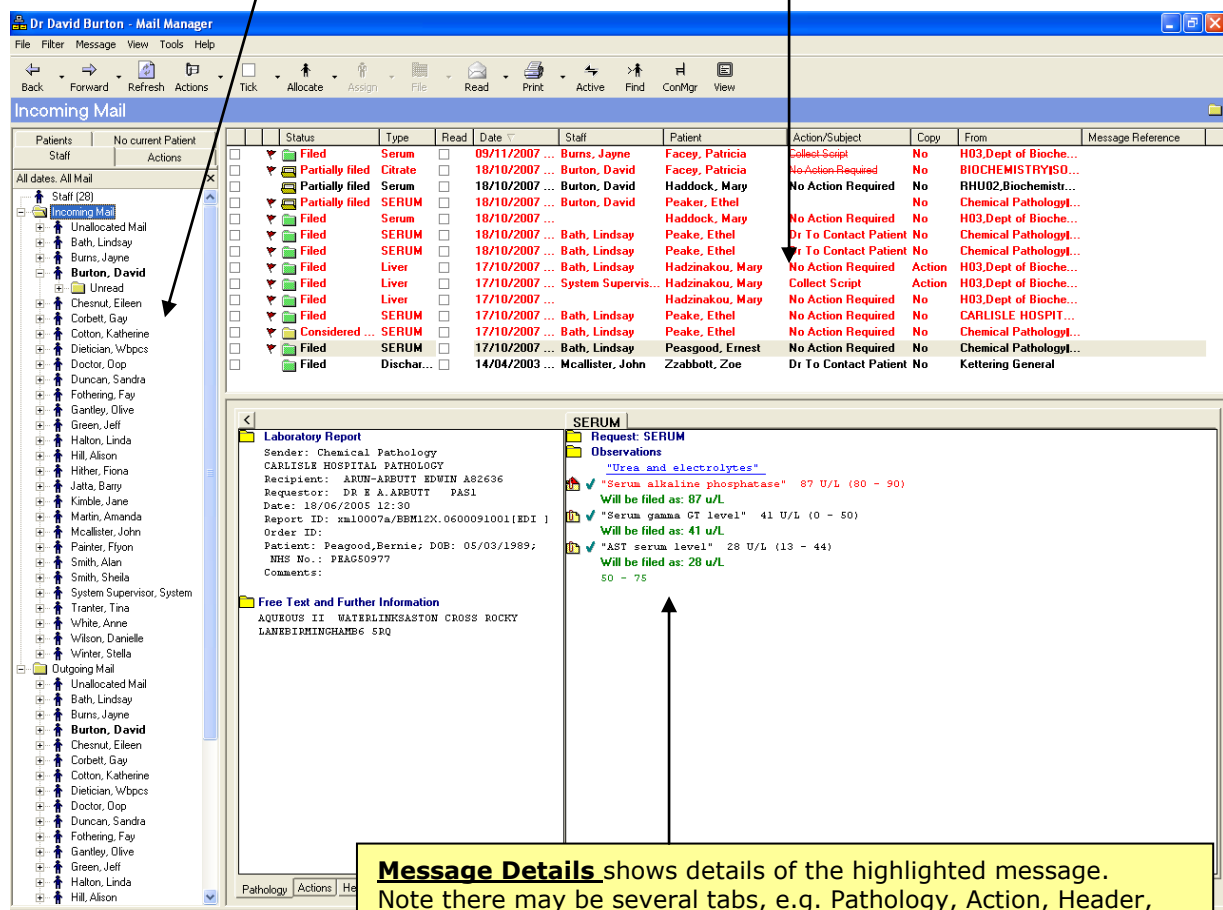
Switching on automatic Mailbox startup

The Mail Manager Interface

The Mail Manager interface contains three panes: Folder List, Message List and Message Details.

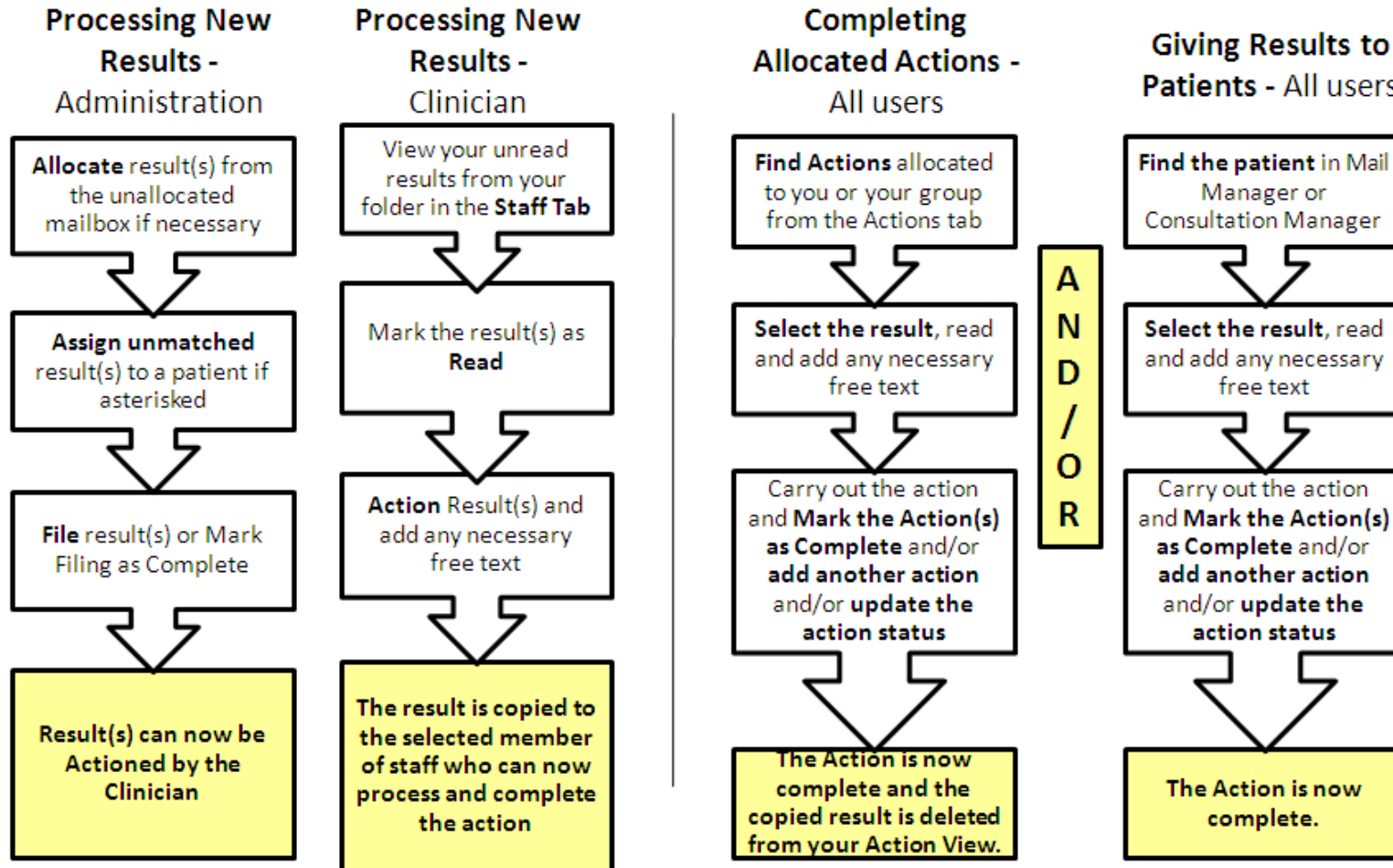
Folder list is divided into Incoming Mail and Outgoing Mail. The tree-view pane down the left-hand side can be expanded by clicking on  and collapsed by clicking on . Here you see your own mail, and any mail to which you have access rights. There are ways to view messages on four tabs: **Staff** (messages by staff), **Actions** (messages with actions), **Patients** (messages by patient name), **Current** (selected) Patient.

Message List across the top right contains a one-line summary of the currently selected message depending on what staff or patient is highlighted on the Folder List. The Read column is ticked if the message is Marked as Read. Right clicking on a message line gives several options. All columns are sortable by clicking on the column header.



Message Details shows details of the highlighted message. Note there may be several tabs, e.g. Pathology, Action, Header, Audit. Pathology results have a divided pane, with the result details showing on the right. Abnormal results are shown in red. Filed items have a green tick. Right clicking gives several options.

Mail Manager Workflow



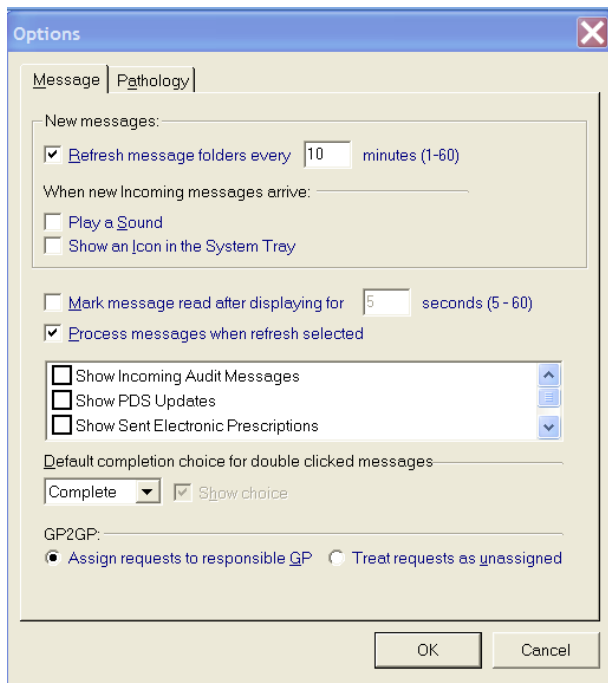
Mail Manager Options (Tools)

Please make sure that as a system administrator you review the settings in the Pathology Tab which are practice wide and that the Message tab (which offer per user settings) is reviewed by each Mail Manager user.

Message tab

Select the **Messaging** menu from Vision front menu, then **Mail Manager**.

Within Mail Manager, from the **Tools** menu, select **Options** and customise as required. These options apply only to the person currently logged on.



Refresh message folders -

This brings in and processes any incoming message. Decide the frequently. The



Refresh icon Refresh refreshes the screen manually

Mark Message Read - if ticked, then the message will automatically be marked as read if the cursor rests on it for a number of seconds.

We strongly advise that the automated Mark Messages as Read function is only used by clinicians and not administrative staff.

Filtering messages

We recommend these options to show National Service messages are left unticked. This means successful completed messages will be hidden and thus your screen will remain less cluttered.

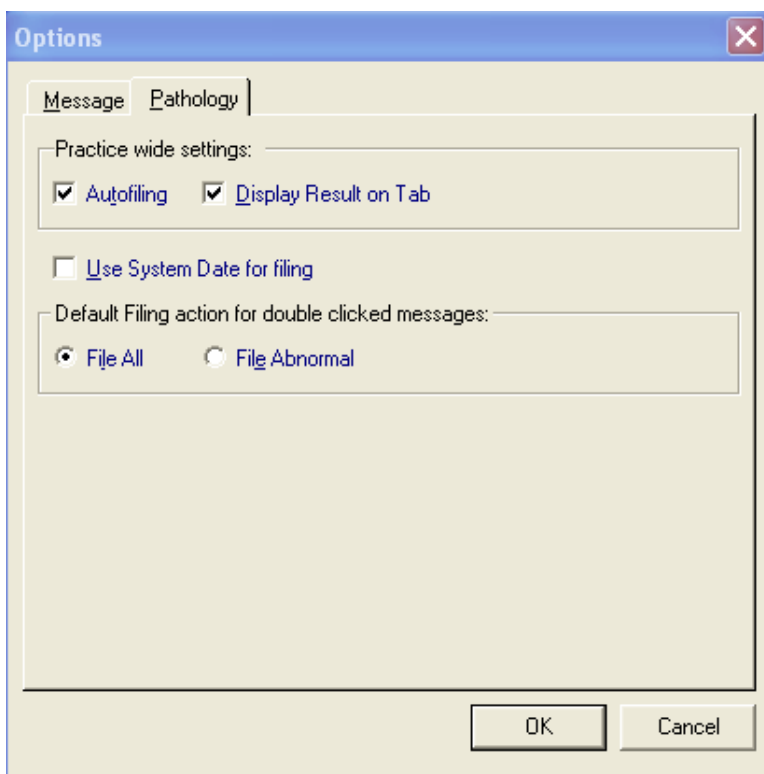
Note that you can also filter the display of messages from the Filter menu (by date and type of mail) and View menu (completed or sent messages).

Default completion choice

If you double click on a message, decide whether the next function is either Add an Action, or Complete the Message. Show Choice, if ticked, allows you to swap your choice.

Pathology tab

These settings are practice wide and can only be changed by a System Manager.



Autofiling - Tick to switch on the automatic filing of results into patients' records.

Even after automatic filing, they can still be marked as read, actioned etc within Mail Manager. This option is greyed out if you are not a system manager. The setting is practice wide.

If you are double clicking on a message, the default is either:

File All - files all result lines in a message; or

File Abnormal files only result lines that are outside the normal range (in red).

Display Result on Tab lets you choose what is displayed on the tabs for pathology results, so if ticked, the tab title takes the first result line (haemoglobin). If unticked, the specimen header is shown, eg Blood.

Use System date for filing - If this is unchecked, then the date of collection of the specimen is the preferred date that the system uses when filing the result. If checked, then the system date is used.

How do I archive messages?

Depending on how many messages you are receiving in Mail Manager, you will need eventually to adopt an archiving strategy to declutter your screen. We advise that in the early days, you should archive at least once a week and as time goes on, possibly daily. Individual users can archive their own messages but, depending on Staff Access rights, you are also able to archive other users' messages.

Archiving has two functions - to speed up access and clean up displays by suppressing historical data unlikely to be of relevance.

You are able to archive just the messages which are allocated to you, those you have rights to or messages for specific users.



Rules for Archiving XML Pathology Messages

The criteria for archiving XML messages is defined on an individual practice basis based on a set of defaults. These criteria are:

1. The message must be read.
2. Non-GP2GP messages must be at least 30 days old (from date of receipt) (though you can amend this period, the minimum being 30 days). Archiving of GP2GP messages varies according to message type and status and the age of the message

Note – From DLM 290, you are no longer able to bulk archive pathology messages which have an outstanding action.

Automatic Archiving - England

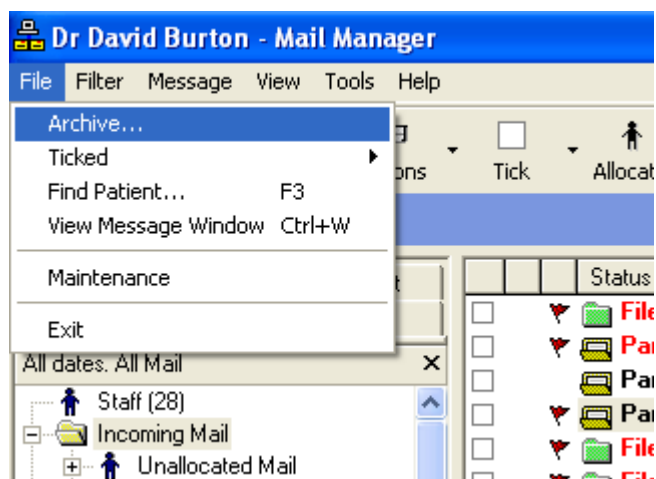
Mail Manager will automatically archive the following incoming messages as long as they have been successfully acknowledged (i.e. with a status of  **Sent** or  **Complete**).

- ETP Messages
- Choose and Book/E-booking Messages
- PDS Update Messages
- GP Summary Messages

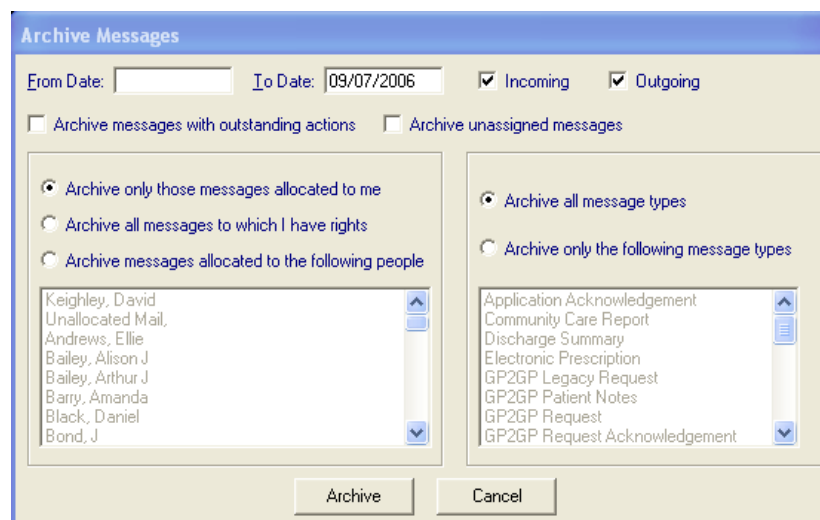
How to archive

Messages are archived from **Messaging - Mail Manager**. Messages can be removed from the live database using **File - Archive** or you can right click on an individual message and select **Archiving**.

1. From the Mail Manager screen select **File - Archive**.



2. Select the relevant criteria for archiving:



- **From Date / To Date** - You can select the date from which archiving should start and the range it covers.
- **Incoming** - By default, both incoming and outgoing messages will be archived. Unchecking the Incoming box prevents incoming messages from being archived. We suggest you leave this checked.
- **Outgoing** - By default, this box is checked. Unchecking the Outgoing box prevents Outgoing messages from being archived. We suggest you leave this checked.
- **Archive messages with outstanding actions** - By default, this is unchecked, which means that messages with outstanding actions will not be archived. Checking the box allows messages with

outstanding actions to be archived as well as those without outstanding actions.

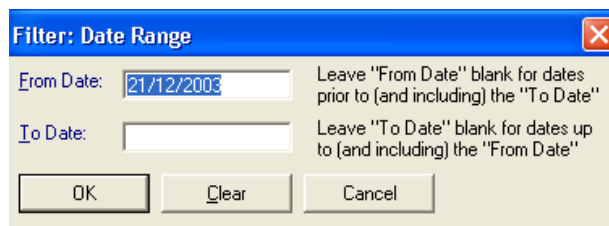
- **Archive unassigned messages** - By default, a message will not be archived unless it has been assigned to a patient. By default the box is unchecked. If checked, unassigned messages will be archived as well as assigned messages.
- **Archive only those messages allocated to me** - By default, only those messages allocated to the current user will be archived.
- **Archive all messages to which I have rights** - Checking this will allow all messages to which the user has rights (those appearing on the Staff tab) to be archived.
- **Archive messages allocated to the following people** - If this is checked, then the multiselect list box below is enabled. The list is mailboxes that you have rights to view.
- **Archive only the following message types:** If this is checked, then you can select from the list. Use Control-click to make multiple selections

3. Click **Archive** to start the archiving process.

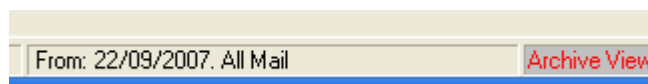
Viewing Previously Archived Messages

Archived messages may be retrieved at any time:

1. Select View - Archive View.



2. At the **Filter: Date Range** screen, decide what From and To dates to enter, if any. Leave the From Date blank for dates prior to (and including) the To Date. The From Date defaults to today's date. Similarly, leave the To Date blank for dates up to (and including) the From Date.
3. On selecting OK the archived messages will appear on the Mail Manager screen. You will be able to see that you are in the Archive View as it will state Archive View in red text at the bottom of the screen.



Note To exit the Archive View, re-select **View-Archive** and you will be taken back to your current Mail Manager screen.
