

Linking Chester Scouts ...



User guide

Version 6 – 2 September 2020



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1. Welcome!

Microsoft 365 is a good system and gives us the maximum security and reliability. I'm sure you will get on well with it. If you have any problems, contact media@chesterscouts.org.uk.

2. Signing in online

To access Microsoft 365, go to <https://www.Microsoft.com/> and click on Sign In.

Enter your Chester Scouts email address and the password that you will have received in a separate email.

You will now be able to access emails etc online. If you intend to use Outlook on your computer to collect and store emails for your account, the next section shows how you set it up.

3. Microsoft 365 using Outlook on your computer

- Open Outlook on your computer
- Click on *Info*
- Click on *Add Account*
- Complete your details (Name, Chester Scouts email address, password) and click on *Next*
- That's it – Microsoft 365 will recognise you and add the settings to Outlook on your computer

If you want to use a system other than Outlook on your computer, contact media@chesterscouts.org.uk for advice.

4. Microsoft 365 on your smartphone

Here are the instructions for setting up your Chester District email system on your smart phone.

Android

There are many different versions of Android. These instructions refer to the base version released by Google, so your device might have a slightly different set of fields.

1. Click *Settings*
2. Click *Accounts*
3. Click *Add Account*

4. Click *Microsoft Exchange ActiveSync* or *Corporate*
5. Enter your Chester Scouts email address and password
6. If you see a *Domain\Username* field, enter your full email address

Note: If *Domain* and *Username* are separate fields, enter your full email address in *Username*, and leave *Domain* blank

7. If you see a *Server* field, enter *outlook.Microsoft365.com*
8. Click *Next*
9. To complete auto configuration, click *OK*
10. Select the account options you want to use. Selecting a longer sync period will show you more calendar information and email, and require more memory
11. Click *Next*
12. Click *Microsoft Exchange ActiveSync*, to see the display name for your email account. You can change the display name here
13. Click *Next* (you will see your inbox)

Your Microsoft 365 email is now set up in your Android mail app (the app will already be on your phone). To make sure you can send messages, compose an email and send it to yourself or to media@chesterscouts.org.uk.

iOS

1. From the Home screen go to *Settings > Accounts & Passwords > Add Account*
2. Select the option for *Exchange*
3. Enter the following information
 - Email
 - Description: *Exchange* is entered automatically

and then tap *Next*

4. When prompted how to sign in to your Exchange account, tap *Configure Manually*
5. Enter your password and then tap *Next*
6. Enter the following
 - Server: *outlook.Microsoft365.com*
 - Domain: leave blank
 - Username: your email

and then click *Next*

7. Turn the options to ON for the areas you'd like to sync (Mail plus any others you may need) and then click Save
 8. Your Exchange account now appears in Accounts & Passwords. Click Exchange (or the name of your Exchange account) to view the account settings
 9. Important: adjust the Mail Days to Sync according to your preferences. This setting means that only messages received within the timeframe you select appear in any of your folders
 10. Click your account email address to view your Exchange account settings
 11. Click Advanced Settings and verify that Use SSL is turned ON. Click Done
- Your Microsoft 365 email is now set up in your iOS device. To make sure you can send messages, compose an email and send it to yourself or to media@chesterscouts.org.uk.

5. Microsoft Outlook app (free download from Google Play or the App Store)

You can also deal with your emails by using Microsoft's own app on your device. This can be downloaded and installed on your smartphone/tablet. The following will help you set up the app on your device.

Android

- Download the app
- For set up guidance, see <https://support.microsoft.com/en-us/article/set-up-email-in-the-outlook-for-android-app-886db551-8dfa-4fd5-b835-f8e532091872>

iOS

- Download the app
- For set up guidance, see <https://support.microsoft.com/en-us/article/set-up-email-in-outlook-for-ios-mobile-app-b2de2161-cc1d-49ef-9ef9-81acd1c8e234>

6. Secure file transfer

When we send personal data around we need by law to keep it secure. The risk increases when we do this digitally. Taking care as suggested here will help us to respect other people's privacy and to comply with data protection law.

As part of our commitment to keeping data secure, it's our policy that our volunteers must not send personal data relating to the Scouts as email attachments or in the text of emails. This does not mean that we are restricting your choice of email account for your personal use; we only want to make sure that the data that Chester Scouts is responsible for is handled securely.

So, what is the alternative when you need to, for example:

- Send in bookings for courses and events
- Advertise an activity and take bookings
- Process youth members joining the Movement
- Process applications for appointments as adult volunteers?

There are many providers of cloud-based storage that you can use to share data. But we need to be careful. In the terms and conditions for some providers, they reserve the right to use the information stored with them for their own purposes (research, marketing and so on). If that is the case, do not use the provider for storage and transfer of personal data for Chester Scouts. In the Appendix to this guidance note there is some information on providers you can use; we shall be adding to the list, so keep an eye out for updates. If you use a system that you would recommend, please let us know so that we can evaluate it and, if possible, include it in our guidance.

If you have any doubts, we can advise – just get in touch:

media@chesterscouts.org.uk. The District Executive Committee is our data controller and will be monitoring the overall process and taking steps to make sure we are compliant.

How can you comply with the legal responsibilities we all have, to make sure we keep personal data safe and secure?

- Don't send personal data in an email or as an attachment to one. Instead, provide a link to your secure cloud storage
- Make sure you use cloud storage providers who do not compromise the confidentiality of the information you store with them. Check the terms and conditions and check from time to time whether they have changed for the worse!
- Only use the personal data for the purpose for which you collected it
- Make sure the personal data is kept secure
- Don't keep personal data once the need for it has passed
- Delete the data securely

- Make sure that those who receive personal data from you understand that they must handle it in accordance with the data protection principles
- Refer to our general guidance on the District web site

What happens if there is a problem?

- Advise your line manager right away
- Contact media@chesterscouts.org.uk, so that help can be provided to solve the problem (in the event of a data breach, this may involve a report to the Information Commissioner)
- If the circumstances require it, the line manager must, with District support:
 - Immediately arrange for any necessary report to be made to all relevant authorities
 - Arrange for the suspension of any members involved, as provided for in Policy, Organisation and Rules. The suspension will remain in place until investigations are complete

Using Cloud Storage Providers

OneDrive

You can share files using our Microsoft 365 account (and not just to people within our Microsoft 365 group). This means that they can read them. However, not everyone will be able to upload replies to your OneDrive – if they aren't on the same system as you.

SharePoint

Our Microsoft 365 subscription also gives us file sharing opportunities, particularly with those also on our Microsoft 365 group. We are working on setting up a robust and consistent approach to using SharePoint but that is a work in progress.

As we extend Microsoft 365 to all our Groups (longer-term) we will be able to use these two programs more and more effectively, but what about until then?

Dropbox

With a free Dropbox account you can share files (for example details of activities) and allow them in turn to send you files (booking forms etc):

https://www.dropbox.com/en_GB/individual.

Once you have your Dropbox account, you can set it up to receive files by creating a file request:

- Sign in to https://www.dropbox.com/en_GB/login
- Click *Files*
- Click *File requests*
- Click *Request files*
- Enter a name for the folder that will store all collected files under *What are you requesting*
- Under *Where should these files go in your Dropbox* you'll see the path to the new folder for receiving files. If you'd like to change the folder's location, click *Change folder*
- Click *Next*
- Click *Copy link* to copy the file request link and send it to anyone you want to request files from. Or you can enter emails of the people you need files from and send the file request directly from Dropbox
- Click *Done*

You'll receive an email whenever people upload files to your file request. By default the uploaded files are private.

Box.com

With box.com, you can upload files and provide a link for others to view and download them. You can also set a folder so that viewers can in turn upload to your online folder. In this way, you can provide details of an event and enable colleagues to send in bookings and other information. You will need to sign up first at <https://account.box.com/signup/n/personal?toggle=true#pk3w4>. Once you are up and running, you can set up permissions for others to access and upload to any of your folders.

- Locate the folder in which you'd like to invite collaborators
- Click *Share* (to the right of the folder name)
- In the dropdown that appears, click *Invite Collaborators*
- Add the emails of the invitees in the box
- Allocate the invitee's permissions in the dropdown menu (eg *Viewer/Uploader*)
- Provide your invitees with the link

7. Application/booking forms etc

Microsoft Forms is a very versatile part of your Microsoft 365 service and you can create application and booking forms easily. You can also create surveys, quizzes and polls. It is easy to download the results.

To create your form:

- Log in to Microsoft 365 online
- On the first page, click on *Forms*
- On the next page, click on *New Form*
- Create your form
 - Give it a name (so that you can locate it again) – click on *Untitled form* and replace the text with your choice of name
 - Add questions according to your needs
- Once you have got the form as you want it, click on the *Share* tab at the top right
- Change the option to *Anyone with the link can respond*
- Copy the link
- In the information you send out to your audience, give them the link so that they can fill in the form
- Log in to check responses as often as required

8. Microsoft Teams and online meetings

Teams is a similar application to Skype - you can meet with people using video/audio conferencing. You can also share your screen so that you can use PowerPoint etc.

Meetings can also be recorded and then shared with others. (**Note:** make sure you tell all participants that the meeting is being recorded and store the recording securely.)

Participants can join on computers/tablets or on phones. They do not need a Microsoft 365 account to join: they can simply log in using the link the organiser of the meeting provides. The presenter/chair can control who joins. They join through a link which you can generate and then send out through any medium, for example OSM.

When youth members take part, make sure parents know about the meeting and always have two adults online at any one time.

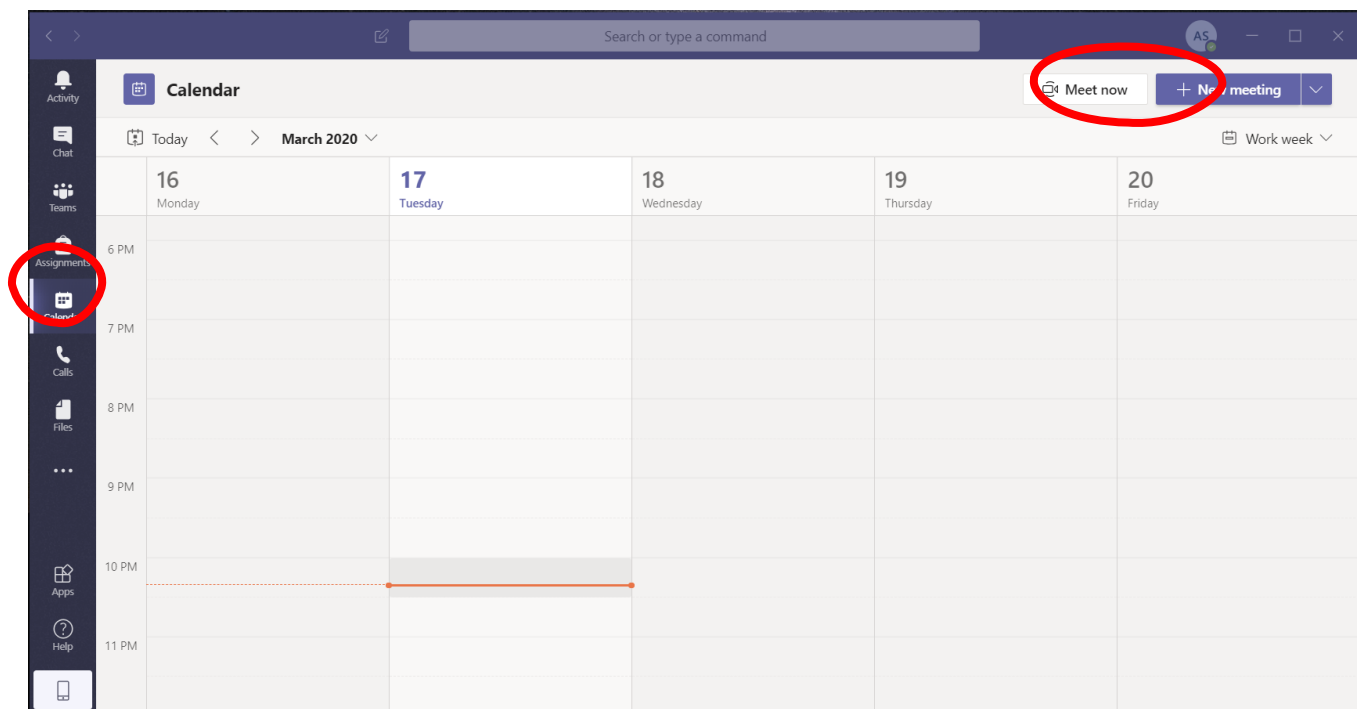
As already mentioned, participants in Teams can be from outside Microsoft 365. If they will be associated permanently then they can be given Guest status. When they receive their first notification from Teams, Guests will need to take a couple of steps to accept it:

- Open the email invitation, and select *Open Microsoft Teams*

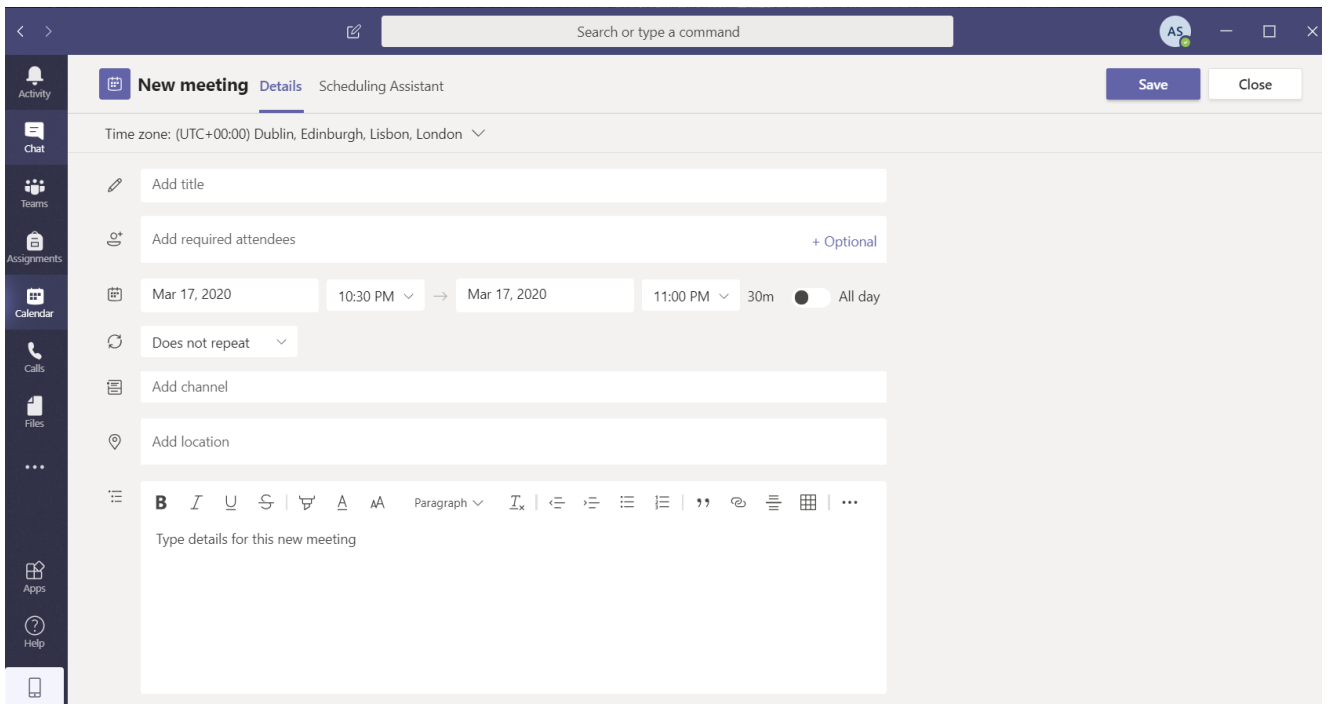
- If their email address has not previously been used to create a Microsoft account, they will need to create one
- On the *Create account* dialog, select *Next*, create a password, and select **Next**
- To verify their email address, open the verification email, and copy the security code
- Enter your security code in the *Verify email* dialog, select *Next*, enter the CAPTCHA in the *Enter the characters you see* line, select *Next*, then *Accept*
- If they do not want to download the Microsoft Teams app, select *Use the web app instead*.

Setting up a meeting (using the Microsoft Teams desktop app)

Login to teams on the desktop app and click on the calendar tab:

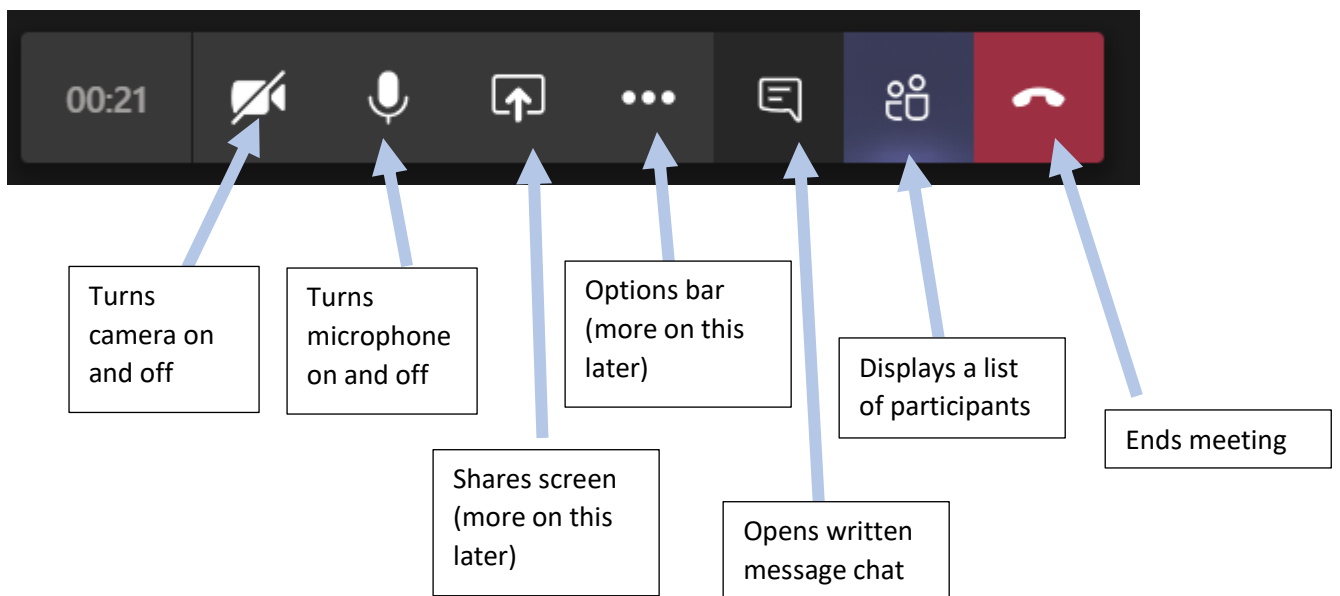


You can add your meeting information:



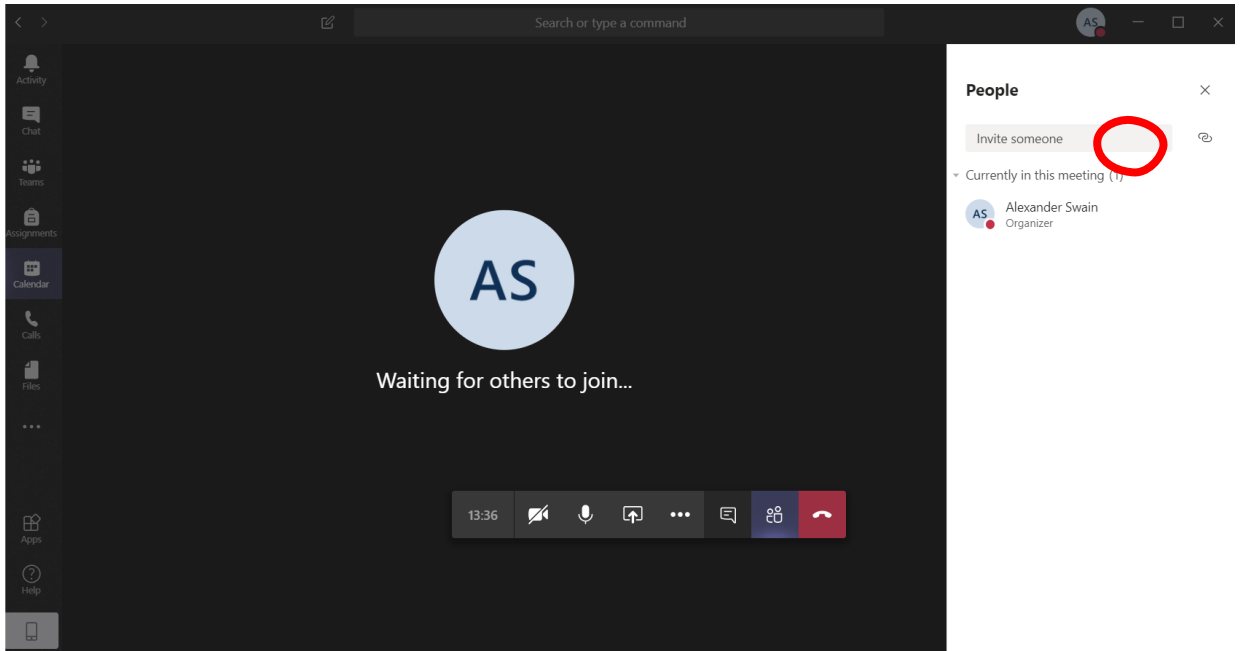
You can also click the **meet now** button to start the meeting.

Once the meeting has started and throughout you have the following options available to you:



Inviting People:

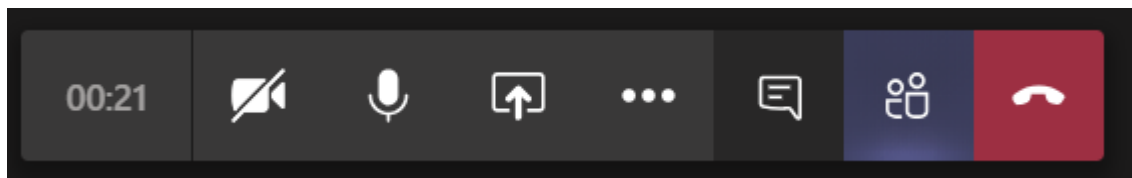
Click on the participants list:



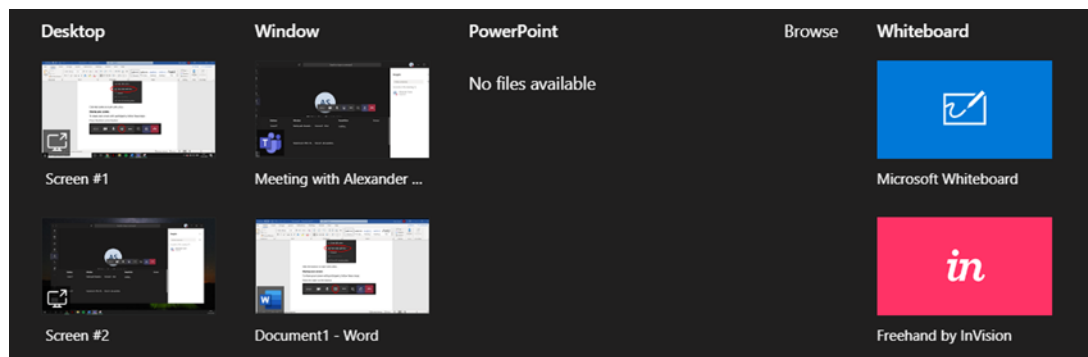
The people tab should come up. On the people tab by the *invite someone* search bar there is a copy link button (circled above). Alternatively schedule a meeting as above.

Sharing your screen:

To share your screen with participants, press the share screen button:

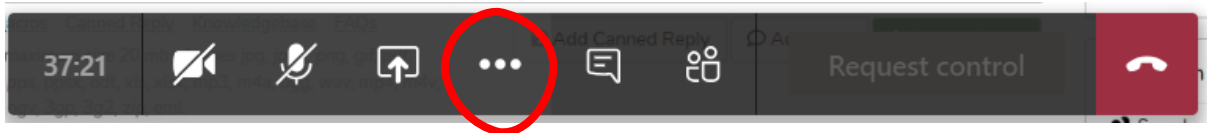


You can share the whole desktop or just a specific window.

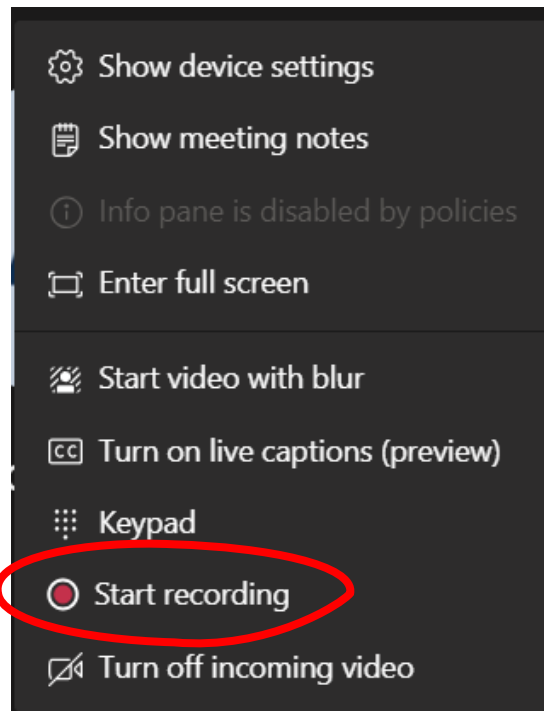


Recording your stream:

You can record the meeting so that anyone not here can view it later. To do this click on the options bar. Make sure you let those in the stream know that you are recording the stream before you start recording.



Then click start recording. (**Note:** You should inform all users that the call is being recorded)



9. To do

In Microsoft 365, you can use the To do app to combine your various lists of things to do into one list, enhanced with reminders and tracking.

10. Data Protection – our guidance notes

- <http://www.chesterscouts.org.uk/members-area/data-protection/>

11. Other apps

Sway

Sway is an app that helps you express ideas using an interactive, web-based canvas. Like a web-based, shareable, user-friendly version of PowerPoint, Sway's flexible design engine helps you quickly and easily produce professional, interactive and visually appealing designs such as newsletters and presentations.

Yammer

Yammer is a private social network that helps you get connected to the right people, share information across teams, and organize around projects. Only colleagues can join, so your communications on Yammer are secure and visible only to people within the District.

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2 September 2020