

**Linking Chester Scouts with**



## **User guide**

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# 1. Welcome!

Office 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](mailto:media@chesterscouts.org.uk).

## 2. Signing in online

To access Office 365 go to <https://www.office.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. Office 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 – Office 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](mailto:media@chesterscouts.org.uk) for advice.

## 4. Office 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.office365.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 Office 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](mailto: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.office365.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 Office 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](mailto: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.office.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.office.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](mailto: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](mailto: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 Office 365 account (and not just to people within our Office 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 Office 365 subscription also gives us file sharing opportunities, particularly with those also on our Office 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 Office 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](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](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 Office 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 Office 365 on line
- 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 chat and collaboration platform. It provides a single hub for your voice, video conferencing and meetings. It will replace our previous program (Huddle) which is being phased out.

To get started, go online to your Office 365 account. Click on the *Teams* icon. This will bring up the program and you then have the option to download the Windows 10 app (so that you can use Teams direct from your desktop) or remain web based.

To set up an online meeting, go to *Meetings* and input the details. You can invite non-Office 365 users to take part in meetings. All those invited to the meeting will receive an email with a link to it. The email will also offer to add details to the recipient's Outlook diary (you don't have to do this if you prefer not to).

You can also download an app for Android or Apple, so that you can use Teams on the move.

## **9. To do**

In Office 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.

DB

3 June 2019