

MS Society email technical guide: PCs and laptops

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What is MS Society email?

MS Society email is one of our six online tools designed to support your group to meet our requirements. It gives your group access to a range of functions that enable you to communicate on our behalf, whilst ensuring that we comply with current data protection legislation.

This technical guide will help you get started with MS Society email, access your inboxes, send and receive emails, work with documents and use your calendars.

Support to use MS Society email

We've developed a set of resources to support your group to use MS Society email.

Technical guides

This technical guide shows you how to use MS Society email on a PC or laptop. If you have a different type of device, click on one of the links below to go to your guide:

- <u>MS Society email technical guide: Android devices</u>
- <u>MS Society email technical guide: Apple (iOS) devices</u>

User guide

Our <u>MS Society email user guide</u> covers who needs to use MS Society email, why and when to use it, data protection, and how to make changes to your group of MS Society email users.

You'll find the full set of resources at <u>Using MS Society email</u> on the volunteer website, and our Supporter Care Team is your key source of support. Contact us if you can't find the answer to your question in our MS Society email resources.

Volunteer Support Team volunteersupport@mssociety.org.uk Tel. 0300 500 8084 - option #3

1. Signing in for the first time on a laptop or desktop

Go to <u>https://login.microsoftonline.com</u>, enter your individual MS Society email address and click on NEXT. Now enter your password and click on SIGN IN.



Security settings

Once you have entered your email and password, you will be asked if you want to stay signed in. If you are using a public computer (for example, in a library or community centre or a shared household one) you must click NO. If, however, all those using the household computer have separate logins to access the device or you are using your personal computer, then you can click YES.



Welcome screen

This is your welcome screen. Here, you can access a number of Microsoft Office applications. Generally, the main apps you will use are Outlook, SharePoint and OneDrive.

Office 365	MS		D 😳 ? Test Person
Good evening		♀ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	nts
Apps			Install Office apps
01 Outlook 🏠 OneDrive	Word X Excel	Page PowerPoint N OneNote	SharePoint
Explore all your apps $ ightarrow$			
Documents		↑ Upload	d and Open New V

2. Self-service password reset sign-up

Microsoft self-service password reset enables you to access your account if you forget your password, without having to involve us.

From any web browser go to <u>http://aka.ms/ssprsetup</u> and sign in using your username and password (your individual MS Society email address is your username).

MS Society email technical guide: PCs and laptops v2



You'll now see this window. Decide whether to add a phone number or another email address to enable the system to verify who you are.

don't lose access to your account!							
To make sure that you can reset your password, we need to collect some info so that we can verify who you are. We your account more secure. You'll need to set up at least 1 of the options below.							
Office phone is not configured. This information is managed by your administrator.							
Authentication Phone is not configured. Set it up now							
Authentication Email Address is not configured. Set it up now							
looks good Cancel							

Click on SET IT UP NOW and enter the requested details. You must set up at least one of the two options. When you've finished, click on LOOKS GOOD.

Making changes to your registration

Follow these steps to update the phone number or email address the system uses to verify your identity.

From any web browser go to <u>http://aka.ms/ssprsetup</u> and sign in using your username and password (your individual MS Society email address is your username).



You'll now see this window. Decide whether to change your phone number or email address that enables the system to verify who you are.

don't lose access to your account!



Click on CHANGE and enter the requested details. You must set up at least one of the two options. When you've finished, click on LOOKS GOOD.

Resetting your password via self-service password reset

If you have registered with Microsoft self-service password reset, follow these steps. We recommend that you register your MS Society email account with this service so you can reset your password without having to contact us.

Go to <u>https://portal.microsoft.com</u>. Enter your email address and click NEXT.

Click on FORGOTTEN MY PASSWORD.

-				
	Microsoft test400@	mssociety.org.uk	Ř	
	Enter password			
	Back	Sign in		
	Forgotten my password			

Top tip: You can also access Microsoft self-service password reset by going straight to <u>https://passwordreset.microsoftonline.com/</u>

In Microsoft self-service password reset, type your email address into the User ID box, complete the characters as requested and press NEXT.

Microsoft	
Get back into yo	our account
Who are you?	
To recover your account, begin by ente	ering your user ID and the characters in the picture or audio below
User ID:	
Example: user@contoso.onmicrosoft.co	um or user@contoso.com
TIT	40 C
R	
Enter the characters in the picture or the	ie words in the audio.
Next Cancel	

Choose whether to have the system email, text or call you.

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Microsoft							
Get back into your account							
verification step 1 > verification	on step 2 > choose a new password						
Please choose the first contact method	we should use for verification:						
Email my alternative email address	You will receive an email containing a verification code at your alternative email address for************************************						
O Send a text to my mobile phone number							
O Call my mobile phone number	Email						
Call my office phone number							

Enter the code from the text message or call and press NEXT. Enter your new password twice on the screen and click FINISH.

Microsoft	
Get back into your account verification step 1 > choose a new password	Microsoft
Please choose the contact method we should use for verification: • Send a text to my mobile phone number • We ve sent a text message to your phone number containing a verification code. • Call my mobile phone number	Get back into your account
Next	* Enter new password:

Resetting your password via our Volunteer Support Team

If you have not registered with Microsoft self-service password reset, contact our Volunteer Support Team for help to reset your password.

Volunteer Support Team volunteersupport@mssociety.org.uk Tel. 0300 500 8084 - option #3

Opening hours: Monday to Friday, 9am-7pm except bank holidays

3. How to navigate through your inboxes

Viewing your inboxes

<u>Click here</u> for the video that will show you how to navigate through your inboxes.

On the left hand side, you will see a menu. The heading should read Folders, with sub-headings below. Your name (Test Person on the example below) marks your PERSONAL inbox.

Your individual inbox shows emails that have been sent to your individual MS Society email address. In there you can create subfolders if you wish to do so. Only you can see emails that have been sent to your individual inbox. When you send an email from your individual inbox, OUTLOOK adds it to your SENT ITEMS folder.

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	shared		Last week			Click here to
	New folder		SharePoint Online The link to "Group Updates - MAS	Thu 25/07		
>	The Shire Old		Ola.Akanbi@mssociety.org.uk has opened	the link		view vour shared
	-		June			
>	Groups		SharePoint Online Lucy Virgo successfully used the II Lucy Virgo < Lucy, Virgo @msociety.org.uk	19/06/2019 > has o		group inboxes

To access your shared GROUP inbox and your 'Old' MS Society inbox look down the left hand side menu for GROUPS (The Shire on the example below). Click on this and a drop down menu should appear with our group name.



Click on your group name and you will be taken to your group inbox.

All volunteers in your group who have MS Society email can view, send and reply to group emails.

Please remember, that only authorised members of the group can delete emails from the group inbox.

Your old MS Society inbox

You will have access to your old inbox for six months. We suggest you transfer any pertinent emails to another inbox or folder so you don't lose information or details you may need at a later date.

Your MS Support inbox

If your group offers MS Support and you are a Lead Support Volunteer or Support Volunteer, you'll also find your MS Support email inbox under GROUPS.

Only trained Lead/Support Volunteers can access and respond to enquiries sent to your MS Support email address.



4. Emailing

Sending an email

In OUTLOOK, click on NEW MESSAGE.



Replying to an email

Click on your INBOX, click on the email you want to reply to then click on REPLY ALL.





Forwarding an email

Forwarding an email means sending it on to someone else.

Click on your INBOX, click on the email you want to forward, then click on the arrow in the right hand corner.



From the drop down list, click on FORWARD.

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Data protection and forwarding emails

You can only forward an email that includes personal information to another MS Society volunteer who has access to MS Society email if you need their help to reply to it. Both parties must use MS Society email whilst dealing with the enquiry.

You must never share emails with a third party, including your own personal, non-MS Society email address.



See our <u>MS Society email user guide</u> for more on data protection and MS Society email.

To, cc and bcc

The TO, CC and BCC fields allow you to indicate how your message should be read by the people that receive it.

Use the TO field to send an email to the people that the message directly affects, and that you require action from

Use the CC field to send a 'copy' of the email to people you want to know about the message, but who are not directly involved



Sending an email to a list of external contacts using the TO line is a data breach. It shares everyone's email addresses with everyone else, which they may not have consented to, or be happy with.

Sending emails from individual and group email addresses

You can send an email from any of your MS Society email inboxes from the same screen.

In OUTLOOK, click on NEW MESSAGE. Click on the FROM and choose the email address you want to use from the list. ADD A SUBJECT, type your message and click on SEND as usual.

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\sim	Folders			John Hamblin Test	09:59	î	î I	Test.Person@groups.mssociety.org.uk
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0	Junk Email		0	John Hamblin Test email - autoresponse? 0	09:58			Other email address
ı	Drafts	81		No preview is available.	_			Bcc
A	Sent Items		•	Microsoft Flow Discover more with Microsoft Flow Free online courses and established templates	01:03 will			W: Test

Group and MS Support inboxes do not have a SENT ITEMS folder. Make sure you always add your group or MS Support email address to the CC field to create a copy.

Your auto signature

All emails you send from individual and group MS Society email addresses are finished with an auto signature that includes your group name and contact details, a link to our <u>Privacy Notice</u> and one to unsubscribe from receiving emails from us.

Your auto signature does not include your name or role. Make sure you sign off your email with your name (and role, if appropriate) before you click on SEND.

You can also create your own signature by clicking on the 'SETTING COG', clicking 'View all Outlook settings' at the bottom of the list, clicking 'Compose and reply', updating your signature in the 'Email signature' box and clicking 'Save'

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Folders		O John Hamblin Test 09-59	10	
Inbox	6	Test email	Cc .	
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Deleting emails

In OUTLOOK click on the email you want to delete. Click on DELETE.



Deleting emails from group inboxes

Your Coordinating Team should nominate two volunteers who can delete emails from your group inbox when they are no longer needed.

5. Member and contact lists

MS Society email does not enable you to store lists of non-MS Society email addresses. We expect you to download contact data from the Portal each time you need it.

Volunteers in these roles can download contact data from the Portal to write to members and others in the area who have agreed for their details to be shared with you:

- Group Coordinator
- Administration Volunteer
- Lead Support Volunteer
- Finance Volunteer
- Communications Volunteer
- Support Volunteer

Contact data on the Portal

Click on this link to sign in to your group's Portal account https://portal.mssociety.org.uk/user/login.

Follow the instructions in our Portal User Guide to download contact data as an EXCEL file. Ensure you click to ONLY INCLUDE PEOPLE WE CAN EMAIL.



To set up your Portal account or get support, see Using the Portal on our volunteer website, or ask the Supporter Care Team for help.

Open the EXCEL file, highlight the list of email addresses and right click on COPY in the drop down list.

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In OUTLOOK, click on NEW Message, and right click next to BCC to PASTE the list of email addresses into the 'blind copy' field.

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Choose which email address to send your email FROM, ADD A SUBJECT, type your message and click on SEND.

Must do: You must download contact data from the Portal each time you need it and delete the EXCEL file as soon as you have sent your email.

If a person does not appear on a current contact list you download from the Portal, you must not contact them for any reason, unless you're replying to an enquiry they sent you.

See <u>Group Handbook A6: Handling data</u> for our rules when handling personal information.

6. Documents

MS Society email includes a secure, GDPR compliant space where you can view and edit files you have uploaded, or received as email attachments.

Uploading files

We expect your Coordinating Team to use your group MS Society file storage to keep any personal data you need to hold, including <u>Physical</u> <u>Activity Readiness Questionnaires</u> (PARQ), service level agreements, team meeting notes and newsletters. You will be able to use SharePoint to as your group storage library.

Seeing your group SharePoint library

When you first login to office.com and go to the SharePoint icon you won't see any sites as even though you are a member, you don't automatically "follow" a site:



In order to for a site to appear on this screen as "followed" it needs to first access be accessed via Outlook.

In Outlook open the group inbox and use the three dots menu to access the site:



One in the site – click on the star (top right next to not following)

🔯 InPrivate	Microsoft Office	Home 📄 You're signed out of Office :	📄 GroupFiles – Tamla.Willie@ç 📄 I	Bristol & South Gloucesters	Mail - Test Person - Outlook	🔲 The Shire - Home	× + ~		-	o ×
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After a while (not instant) the sites you follow will appear under "Following". Also if there has been activity on a site you are a member of this will appear under the news section:



Adding documents to your file storage

There are two ways to add documents to your MS Society email file storage:

- 1. Upload them directly from your computer
- 2. Send them to your group MS Society email address as an attachment

Uploading files to your group file storage (SharePoint)

In OUTLOOK, click on your group inbox, then click on FILES icon.

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\odot	Junk Email			John Hamblin	
0	Drafts	81	_	Test Test email	09:59
⊳	Sent Items			John Hamblin	
>	Deleted Items	7	•	Test email - autoresponse? No preview is available.	09:58
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That will take you to the Share Point library where you can see all your shared files. Click UPLOAD, browse the folders on your computer and choose the file you want to upload. Either double click on it, or click on OPEN.

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Drag files here to upload

Uploading files to your individual file storage (OneDrive)

In OUTLOOK, click on the APP LAUNCHER (we call it the Waffle) icon in the top left corner then click on the ONE DRIVE icon.



Click on FILES under your name, click on UPLOAD and follow the same process as uploading files to your group file storage.

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Email attachments

An email attachment is a file sent along with an email message. Attaching a document to an email is a simple way to share it with others.

Top tip: Sending a document as an email attachment to your group inbox is an easy way to add it to your group file storage.

Viewing attachments sent to your group inbox

Email attachments sent to your group inbox are automatically saved to your group file storage.

Email attachments and data protection

Stop and think before opening an attachment. Am I expecting something from this person? Does it make sense for them to be sending this type of thing?

If you have any doubts, contact the person (Not by email. If the account has been hacked, the hacker might reply) to check before opening the attachment. Don't forward the email to other people as they may accidentally follow it.

In OUTLOOK, click on your Group inbox then click on FILES icon. Choose the file you want to open and click on it.

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Editing shared files

In the file, click on EDIT to make changes.

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OUTLOOK will automatically save your changes.

Sending an email with an attachment

In OUTLOOK, click on NEW Message, complete the FROM and TO fields, ADD A SUBJECT and type your message.

To add your attachment, click on ATTACH, click on BROWSE CLOUD LOCATIONS then click on either ONE DRIVE or GROUP FILES.



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Click on the file you want to attach, click on NEXT. You can attach a file as a link or as a copy. Remember that only those who have access to Share Point will be able to see a file which is attached as a link. SEND your email as usual.

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Must do: When emailing members and contacts, don't forget to add them to the BCC field to protect their privacy.

Creating and saving new documents

Office 365 enables you to create Word, Excel and PowerPoint documents and save them in your group or individual file storage.

In OUTLOOK, click on your group inbox, click on FILES icon then click on NEW.

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Pick which type of document you would like to create and edit it. When you have finished, click SAVE AS to give your document a name and decide whether to save it in your group or individual file storage. To save your document in your individual file storage, click on FILE, click on SAVE AS, NAME your document, then click on SAVE.

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7. How to use your calendars

MS Society email also includes individual and group calendars. These enable you to schedule team meetings and keep track of when your services, activities and events are due to take place. You can add agendas to meetings and set reminders so no-one forgets what's coming up.

To access your calendars, click on the calendar icon at the bottom of the left hand side menu.

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You will be taken to your personal calendar with a large monthly view and a split section with today's date. Just above this main calendar (top right of the page), you will see: Day, Work week, Week, Month. By clicking on one of these, you can set the view to your desired preference.

To alternate view between your personal calendar and group calendar click on either 'My Calendar' or 'Group Calendar' on the left hand side.

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Scheduling a new meeting

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Outlook 🔎	The Shire V	er x 💿
🗊 Today 个 \downarrow	🔚 Save 📋 Discard 📑 Scheduling Assistant 🔤 Busy 🗸 🗐 Response options 🗸	onth 🗸 년 Share 🖶 Print 🌘
Monday 29 Jul	• An invitation won't be sent to group members unless you im	Wed, 14 Aug
	Add aditle	E contraction de la contractio
	R Invite attendees	8 8:00 - 8:30 You are available
5	⊙ 14/08/2019 🛅 08:00 ∨ to 08:30 🖌 🖉 All day 💭	⁹ Set the start and finish dates and times
	\mathcal{Z} Repeat: Never $arphi$	Add the location
12	Search for a room or location Teams meeting	
	[7] Remind me: 15 minutes before	Set a reminder for nearer the time
	Add a description or attach documents ▲	13
19		Add an agenda and/or other attachment
		16
26		17

Tell us what you think

We hope you find this MS Society email technical guide useful and we're keen to hear your feedback and suggestions. Please <u>click</u> <u>here</u> to complete our short evaluation survey.

MS Society email technical guide: PCs and laptops v2				
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