

MS Society email technical guide: PCs and laptops

Click on any title to go to that section.

Contents

1.	Signing in for the first time on a laptop or desktop	4
Se	ecurity settings	4
W	elcome screen	5
2.	Self-service password reset sign-up	5
M	aking changes to your registration	6
Re	esetting your password via self-service password reset	7
Re	esetting your password via our Volunteer Support Team	9
3.	How to navigate through your inboxes	10
Vi	ewing your inboxes	10
Yo	our old MS Society inbox	11
Yo	our MS Support inbox	11
4.	Emailing	12
Se	ending an email	12
Re	eplying to an email	12
Fc	prwarding an email	13
Se	ending emails from individual and group email addresses	15
Yo	our auto signature	16
De	eleting emails	16
De	eleting emails from group inboxes	17
5.	Member and contact lists	17
С	ontact data on the Portal	17
6.	Documents	
U	bloading files	18

	Seeing your group SharePoint library	19
	Adding documents to your file storage	21
	Uploading files to your group file storage (SharePoint)	21
	Uploading files to your individual file storage (OneDrive)	23
	Email attachments	24
	Viewing attachments sent to your group inbox	24
	Editing shared files	25
	Sending an email with an attachment	25
	Creating and saving new documents	26
7	. How to use your calendars	27
	Scheduling a new meeting	28

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 Volunteer Support 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

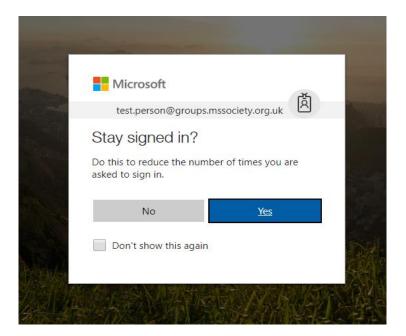
1. Signing in for the first time on a laptop or desktop

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.

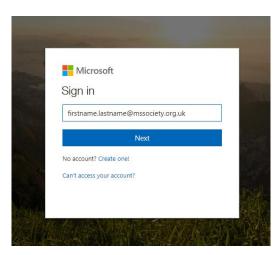
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2. Self-service password reset sign-up

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.

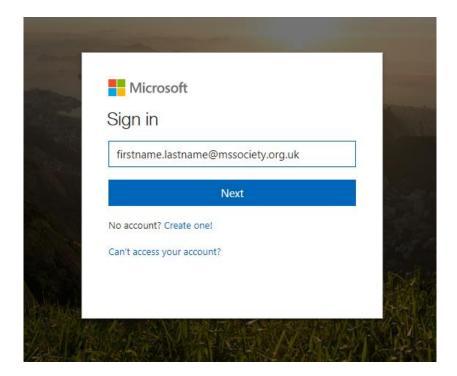
don't lose access to your account!
To make sure that you can reset your password, we need to collect some info so that we can verify who you are. We your account more secure. You'll need to set up at least 1 of the options below.
Office phone is not configured. This information is managed by your administrator.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

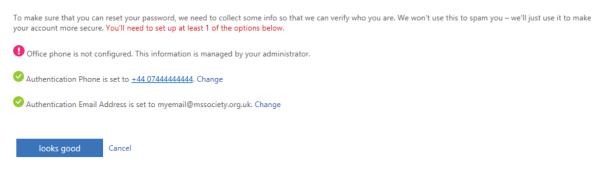
Follow these steps to update the phone number or email address the system uses to verify your identity.

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@	omssociety.org.uk	Ř	
100	Enter password			
	Back	Sign in		
	Forgotten my password			

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

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 you	ur account
Who are you?	
To recover your account, begin by enterin	ng your user ID and the characters in the picture or audio below.
User ID:	
Example: user@contoso.onmicrosoft.com	or user@contoso.com
TITES	40 C
R	D.
Enter the characters in the picture or the	words in the audio.
Next Cancel	

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

MS Society email technical guide: PCs and laptops v2

Microsoft	
Get back into yo	our 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 (jo************************************
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: O Send a text to my mobile phone number We ve sent a text message to your phone number containing a verification code. O 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

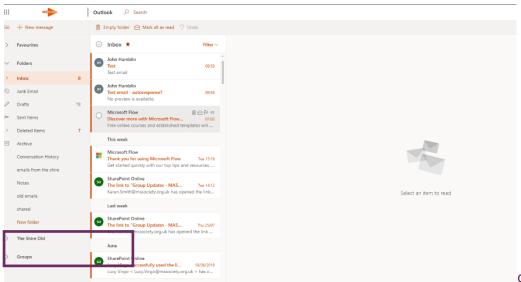
<u>Click here</u> for the video that will show you how to navigate through your inboxes.

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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	old emails		Last wee			Select an item to read	
	shared	10					Click here to
	New folder	-	The link		hu 25/07		
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>	Groups	1			106/2019 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.

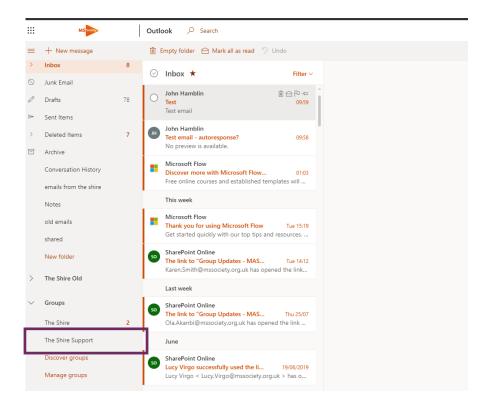
Your old MS Society inbox

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.

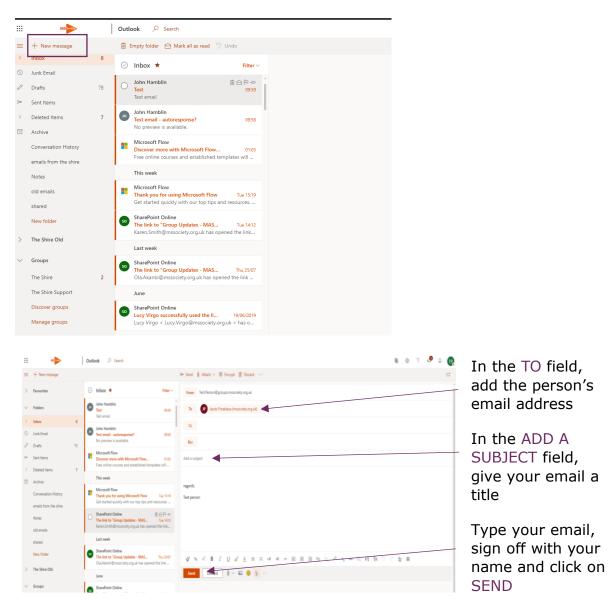
Only trained Lead/Support Volunteers can access and respond to enquiries sent to your MS Support email address.



4. Emailing

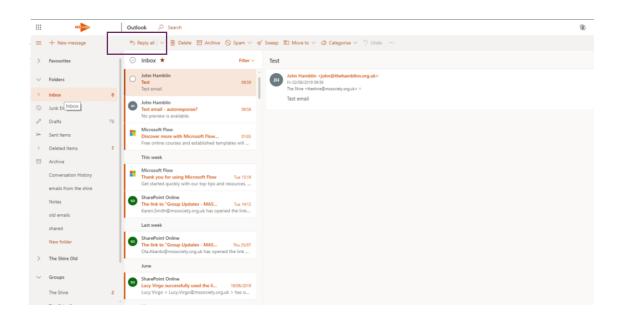
Sending an email

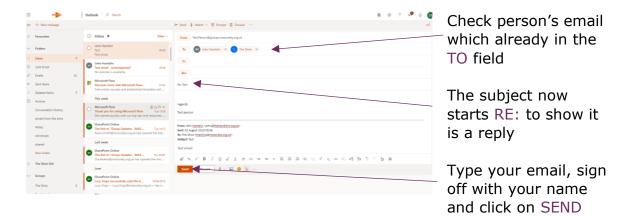
In OUTLOOK, click on NEW MESSAGE.



Replying to an email

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

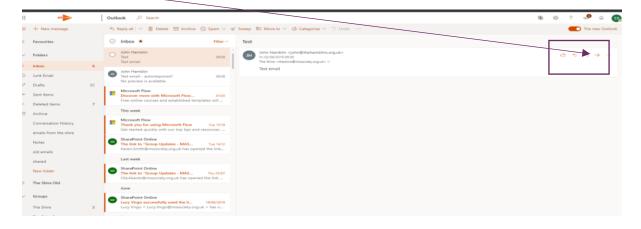




Forwarding an email

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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~	Folders		O John Hamblin Test	09:59	î	Test.Person@groups.mssociety.org.uk							
	Inbox	6	Test email			theshire@mssociety.org.uk							
>	Junk Email		John Hamblin Test email - autoresponse?	09:58	Ĩ	Other email address							
,	Drafts	81	No preview is available.	_		Bcc							
-	Sent Items		Microsoft Flow Discover more with Microsoft Flow Free online courses and established template	01:03 s will		FWI: 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.

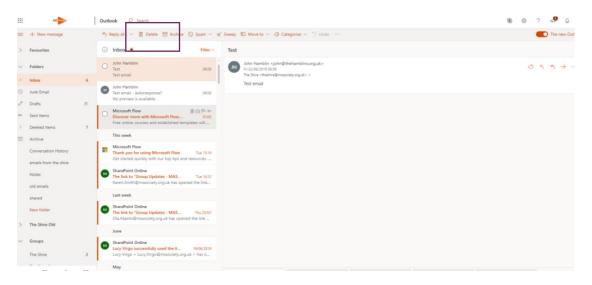
Your auto signature does not include your name or role. Make sure you sign off your email with your name (and role, if appropriate) before you click on SEND.

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	To	
Inbox	6	Test email	Ce	
Junk Email Drafts	81	Test email - autoresponse? 09:58 No preview is available.	Bcc	
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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:

- <u>Group Coordinator</u>
- Administration Volunteer
- Lead Support Volunteer
- Finance Volunteer
- <u>Communications Volunteer</u>
- Support Volunteer

Contact data on the Portal

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

Follow the instructions in our <u>Portal User Guide</u> 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 <u>Using the Portal</u> 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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То					То				
Cc					Cc				
Bcc	Undo	Ctrl+Z			Всс	T test.perso	n1@email.co	uk ×	
Add a subjec	Redo	Ctrl+Shift+Z		_	(T test.perso	n2@email.co	uk ×	
Add a subjec	Cut	Ctrl+X		_		test.perso	n3@email.co	uk ×	
Add a messa	Сору	Ctrl+C							
	Paste	Ctrl+V				test.perso	n4@email.co	.uk ×	
	Paste as plain text	Ctrl+Shift+V			(T test.perso	n5@email.co	uk ×	
	Select all	Ctrl+A							
	Select all Spellcheck Writing Direction	Ctrl+A	•		Group newsle	etter - Summer 201	18		

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

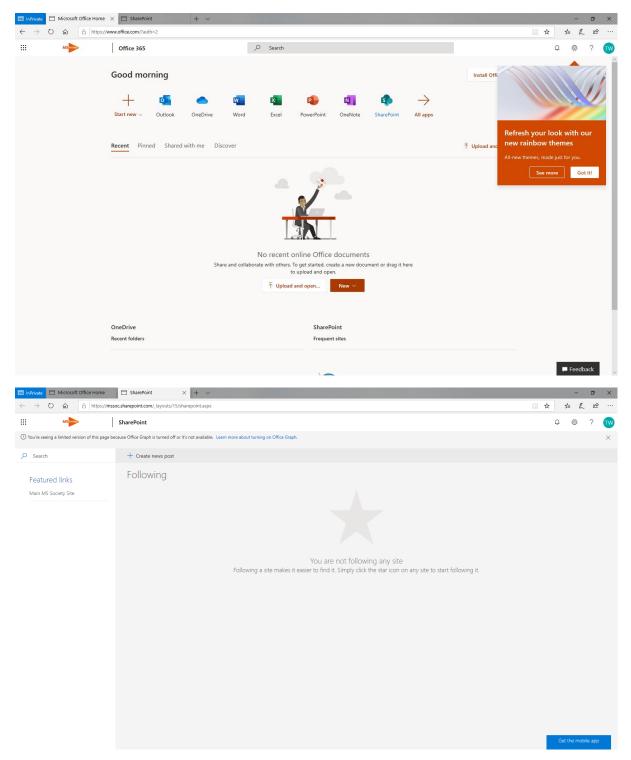
MS Society email includes a secure, GDPR compliant space where you can view and edit files you have uploaded, or received as email attachments.

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.

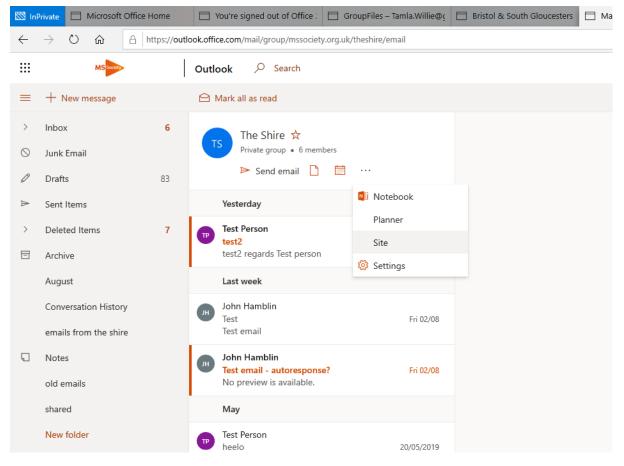
Seeing your group SharePoint library

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.

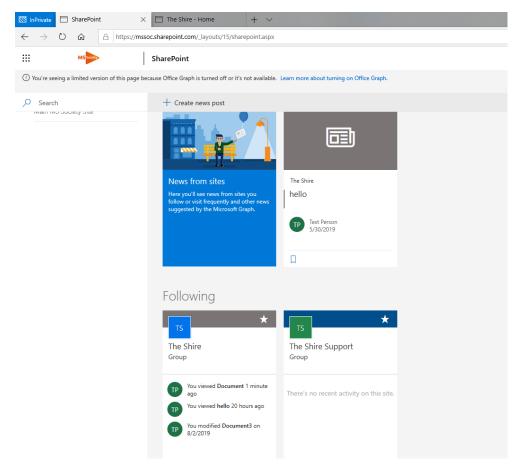
In Outlook open the group inbox and use the three dots menu to access the site:



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

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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.

	ALS		Outlook 🔎 Search	
=	+ New message		Mark all as read	
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>	Inbox	6	Today	
0	Junk Email		John Hamblin	
0	Drafts	81	Test Test email	09:59
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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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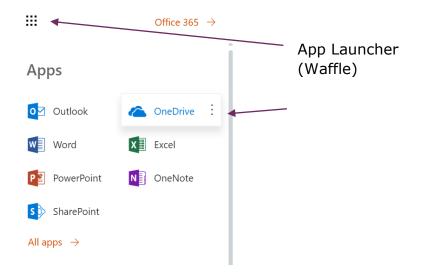
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		Project Plan_O365 migration_Fi	August 7	Test Person	849 KB	

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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	test	28/01/2019

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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12	⑦ Remind me: 15 minutes before ∨	Set a reminder for nearer the time
	= Add a description or attach documents	13
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		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.

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Content Owner:	Volunteering Manager			
Sign off date:	August 2019			