Sheffield Citizens Advice

Guide to Using the IT Systems

Contents

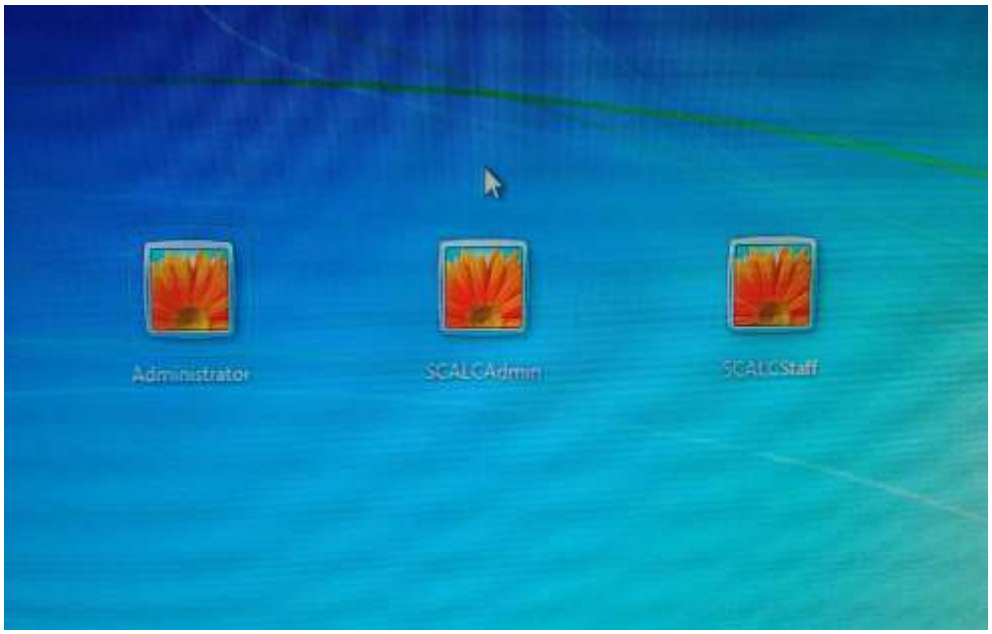
Using Your Computer

Sheffield Citizens Advice has a computer system which provides the same Windows 7 based desktop experience to all its users. You log on to your computer, and a special program launches a session which actually runs on our servers. You see this session in a window that occupies the whole of your monitor and is controlled by your mouse and keyboard and will print to a printer near you.

To access the system you will need to log on to your office PC then log on to your desktop on the server.

1. Logging on to your computer

After switching on your computer it will show the following screen:



- Click on the "**SCALCStaff**" user.
- You will need to enter the password. This is the same for all SCALC users, but changes regularly - currently it is Cherries03. This means that you will be able to use any computer in any SCALC office.

2. Log on to your desktop on the server

Your office computer will then automatically start to connect you to your desktop on the SCA server. On the first occasion you may need to approve the connection taking place and the security certificate for the connection:

User Name

You will need to log on using your personal user name and in the format of

firstname.surname

If this is the first time that the computer has been used to log on to the SCA server you may need to enter it as

SCALC\firstname.surname

Passwords

- Your password will be 1234pass! for the first log in, but you will need either immediately or at a later date to set a unique password for later log-ins.
- Passwords are otherwise not set to expire after a period of time.
- If you change your password, it will take at least 10 minutes before the change affects email access. You should therefore wait before accessing emails or using Outlook for your calendar etc., after a password change.
- If ESP need to work on your user account because of a problem, then they will change the password and will ask you to log on again using the default password, which you will once more have to change to a unique one.

DO NOT TICK THE BOX TO SAVE YOUR CREDENTIALS WHEN CONNECTING!

Changing Your Password

You now need to change your default password from 1234pass! to a password of your choosing. Your password should consist of at least 8 characters and have at least one example of any three of the following

- Lower case characters
- Upper case characters
- Figures
- Punctuation (?!& etc)

To do this:

1) After logging on to a server session, press Ctrl+Alt+End keys together
2) Select 'Change Password'
3) Enter your old password and your new password (twice) as instructed.
4) Press OK.
5) You should then log off Outlook. (It is also desirable to restart your server desktop session to log in with the new password).
6) Restart Outlook and when it asks for your password, enter your new password, and tick the box to save your credentials.

If you forget your password

You will need to contact a manager to arrange with ESP (our IT contractor) to have it reset. They will provide you with the temporary password to use once, which you will need to change to something more memorable using the procedure above.

First time log in's

On a first time log-in, you should click on the desktop icon for **Outlook,** which provides your e-mail.

Your e-mail account will then be set up – it should acquire the settings automatically – but if it doesn't you may be asked for your user name and password again. Otherwise just click next in each box (provided your details are correct)

How do I log off and shut down?

To log off and shut down:

1. click on the Start (Windows) button on the screen of your server session window and select log off, then....
2. If the menu below appears (see below) click on 'Exit', then....
3. On the desktop that appears click on the start button and select 'shut down'.

To lock your screen whilst away from your desk or to disconnect to move your desktop session to another PC, see the section on 'Your Desktop'.

The PC connects to the server without asking for log on details – what do I do?

Staff should not save their log on details for the server session. This breaches our security for the system and most machines will prevent saving credentials, but not all do. If you find a PC or laptop with saved credentials, inform ESP and ask them to stop it saving credentials for the remote desktop connection.

They will need the PC number which you can get from, ending (or minimising) your server session, then clicking the option for 'Computer Details' on the white ESP Thin Client menu (see next page).

You can also stop a PC doing this in the following manner.

1. Exit your server session and if the white screen is there, click on the option to exit this.
2. Open windows explorer – the folder icon is on your taskbar at the bottom of the screen.
3. Navigate to Computer - C:\RDPEnvironment
4. Right click on RDGateway01 and select 'Edit'
5. On the general tab in this, underneath the log in details there should be an option to delete or forget the current saved credentials. Tick on this then select save.
6. Exit this, then relaunch the server desktop and it should ask you for credentials.

What is the 'ESP Thin Client' Menu

If the log-in fails for any reason, or you log off your server desktop, you will be presented with a menu:

You can start your server desktop from the menu, you will need to select '***Primary System Access***'. You can then log-in as described above.

You may also see this menu if you have locked your screen or your display has blanked due to power saving settings. If this happens, and you have a server session running, click 'exit' on the menu first. If it does not show the server session, look in the taskbar at the bottom of your screen (a computer icon), and click on this.

What do the other options in the menu do?

First, you can see the contact details for ESP's Helpdesk. Not all IT support issues go to ESP – for instance issues about Petra will often go to Citizen's Advice ICT Support. See the section on getting IT support.

Secondary System Access – If the main server goes down for an extended period, this will switch you to connect to the secondary server. This will behave in exactly the same way as the primary

system., and you should not notice the difference. **Do not** use the secondary system unless directed to do so, as this will cause problems with synchronising data and e-mails.

Reboot PC – This will shut down and restart your PC, without starting a server desktop session.

Computer Details – This will give you the computer name. If you have a technical problem and contact ESP, they will ask for this.

Fix Petra – If neither server is available, but you still have an internet connection on the local PC, you will be able to use Internet Explorer on the local PC without connecting to the server. This option will change the settings in Internet Explorer for maximum compatibility with Petra.

Update – This will launch Windows Update, so you can install updates to the operating system. You may need to have SCALCAdmin access to do this.

Exit – This will drop you down to the local PC. You can then shut down the PC. In the unlikely event of both primary and secondary servers being unavailable, you can still use Internet Explorer to access Petra and your e-mail (by webmail), and use Word to create documents.

The menu is not there and I am not in a server desktop session – what do I do?

You can relaunch the menu and your connection by going to Start > All Programs > Startup > and click on 'Winlogon'.

Your Desktop

Can I change the appearance of my server desktop?

You can change your desktop background but are limited in what backgrounds you can select. To do this:

- Right click anywhere on a blank area of your desktop and then select 'Personalize'.
- Choose a background that suits you.

Can I make the screen or text easier to read, for clarity or accessibility?

You are able to change the font size and use accessibility options. To do this:

Accessibility adjustments:

- Right click anywhere on a blank area of your desktop and then select 'Personalize'.
- You can select acolour scheme there if required. Pale pink and pale yellow have been set up with a view to being more readable for dyslexic users. Otherwise….
- At the bottom left of the window select 'Ease of Access Center'.
- From there you can select an on screen magnifier and other adjustments

Font size and clarity

You can adjust this across Windows in the following way:

- Right click anywhere on a blank area of your desktop and then select 'Personalize'.
- At the bottom left of the window select 'Display'
- In the next screen, adjust the default font size through 'Set Custom Text Size' – you will have to log off then back on again for this to take effect; and/or
- You can switch on clear type to make font's easier to read.

In individual programmes:

- In any MS Office application (Word, Excel, Outlook etc) you will find a slider on the bottom right to increase the size of the text in the window);
- In Internet Explorer, Firefox or Chrome, you can make the text etc larger by pressing CTRL and + (plus) to enlarge or CTRL and – (hyphen) to make it smaller.

What is the blue bar at the top of my screen?

This shows that you are in a server desktop session.

If you click on the pin on the left, then this will allow the bar to disappear. This helps you see the top of windows you open. To see it again move your mouse cursor to the top of the screen. To pin the bar there permanently, click on the pin again.

What programs do I have?

Your desktop on the server will have certain programs available:

- Microsoft Office Pro Plus:
    - Word for documents and letters
    - Outlook (for e-mails)
    - Excel for spreadsheets
    - Access for databases
    - Publisher for creating leaflets and booklets
- Internet Explorer -for the internet
- Firefox and Chrome – these are also available for the internet. Do not change these to be your default browser as this may prevent your shortcut to the Petra case management system from working.
- Quick Benefits Calculator
- CASE (for pre-October 2013 cases)

- Casetrack – the database for legal aid cases used and only accessible to the Legal Services Team.

- Adobe Acrobat Reader for PDF documents.

- A link to DATA (Z drive where all company files are stored.

- Shortcuts to
  - Advisernet
  - Advice Sheffield website
  - Petra
  - Petra training
  - Cablink and BMIS

Those users who are authorised will also have the following specialist programs:

- Quickbooks (for finance staff)
- IRIS (for payroll)
- Simply Personnel (for those managing staff)
- Volunteer Database (an Access database for those managing volunteers)
- QGIS (mapping software)

Can I install my own programs on my server desktop?

You are not able to install programs. If there is a program required for your work, then please contact your manager who will decide whether this is needed and pass on the request.

Can I use CD's, DVD's or connect memory sticks

Because we handle confidential client data, we do our best to prevent any method whereby this can be wrongly removed from our IT system, or through viruses or malware being introduced to our systems. You should read our safe usage policy.

You must have permission to access CD's, DVD's or memory sticks, and if given this access will have to have them scanned for viruses. Memory sticks may not be used for storing personal information (e.g. on clients or staff or volunteers) unless they are approved and FIPS compliant.

Any authorisation for the use of memory sticks (and the purpose and duration) must be notified to the IT lead, for recording.

Can stream music or videos?

Again, to avoid strain on network connections we ask you not to stream music or video from your server desktop unless it is necessary for the work you do.

Which printer do I use?

When you need to print, your server session has been set up with the printer nearest to you as the default printer. Additionally, you should have another printer to use if this is out of action, or you need a special facility such as colour. You can select this from the print dialogue box. Volunteers may have a number of printers for the whole of the site to use.

If you are working away from your usual site, and wish to print, you can ask ESP to enable you to print from a computer at the site you are working at. You can also do this if your printer stops working and you want to have a back up printer to use.

Where do I save documents and files?

You can save files in several places:

- **to 'Documents'**, and any sub folders you create. This folder and any sub-folders (including your Desktop) can only be accessed by you. If you previously had a log in on a ;

- **to Petra –** you need to first save temporarily to your Documents folder then upload. ALL documents (or files) you create or are sent, that are related to a client, need to be uploaded to Petra, and then deleted from where it was first saved.

- **to the shared Z Drive 'Company'**. You will find this under 'Computer' in Explorer or when youa are trying to save or open a file. You need to have permission to save to the particular folder you choose. You should ensure that the document needs to be shared and it is being saved in the appropriate place. ***See the section on how Z Drive is organised.***

You can also save to your desktop, but we discourage this.

Can I lock my screen when away from my desk?

Yes, you can. Simply press Ctrl+Alt+End and select Lock Screen. For information assurance reasons you should **always** do this when away from your desk.

Can I leave my server session running?

Whilst you should obviously lock your screen when away from your desk (see above), there is no harm in keeping it running for short periods.

Your server session will be terminated if you are not active in using it, or your connection is broken but only for 3 hours.

If you transfer to working on another PC, then you can disconnect the PC your server desktop was on, by clicking on the 'X' on the blue bar. On the PC you want to work on, you can start a server desktop session, and this will pick up the session as you left it, including any running programs.

This might be useful if you are moving between an office desk and a desk in an interview room.

Can I still work if I cannot connect to the server?

Yes, you can. If you cannot connect to the server or it has slowed down, then it may be something related just to you or your PC or there might be a server problem affecting everyone. If it is the latter then do not report it yourself - ensure your manager knows and they shall let other users and ESP know).

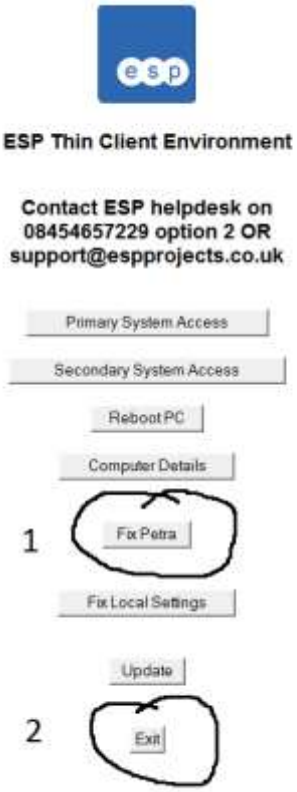
It is, though, still possible to use your PC outside the server session to get on with your work – with the exception of documents stored on the server. You can still use Microsoft Office, Petra and the internet –Nellbooker, Advice Sheffield, Advisernet, access e-mails and so on. You should also be able to print.

Getting to Your PC desktop

To do this, follow these steps:

1. If in a server session, you can log out or minimise it (by clicking on the minus sign in the blue bar at the top).

2. If you then see the white ESP Help Screen – first click on 'Fix Petra ', followed by 'Yes' in the box that appears and 'Okay' when it has completed. This makes Internet Explorer work properly with Petra. You only need to do this once.



3. Then after this has finished, click on Exit to make the white ESP Help Screen disappear.

4. You should now be on the desktop for your PC.

Using Programs and Websites on Your PC Desktop

5. You should be able to find icons there for the Petra Live System, Petra Training System, Advisernet, Advice Sheffield, Nellbooker, SCA Webmail (for your emails and Calendar) and possibly also Quick Benefits Calculator. You can use these to launch the programs. If you cannot find these icons, then enter the addresses from the list at the end of this section into Internet Explorer.

6. You should also find that you can use Microsoft Office 2010 – Word, Excel, Powerpoint, Publisher etc. If the icons are not on your desktop go to Start -> All Programs -> Microsoft Office, to find them.

7. You can save documents on your PC, but when the server becomes available again, you must move your documents to the server. To do this, right click on the document where you saved it, then select 'Cut'. Then, in the server session, use Explorer to find the folder where you want to save them, right click on an empty area and select 'Paste' from the menu.

8. You should also find that you have at least one printer set up to use. This might not have the same name as when you are on the server, and might not be the one nearest you, but should still be useable.

Getting E-mails

9. You might also have an icon for SCA Webmails on your desktop, but some users do not at present.

10. If you do, then click it. If not, then – in Internet Explorer (or Chrome or Firefox) - go to http://mail.office365.com and enter your full email address and your password to log on to your SCA emails.

Re-launch your server session

11. If you minimised your server session, you will find it in the taskbar at the bottom of your screen as the picture of a computer. Click on it.

12. If you exited your server session, then you will probably find an icon on your desktop to 'Relaunch …' your session. Click on this and it will bring up the white ESP Helpscreen menu and automatically try to connect you.

13. If that icon is not there go to Start -> All Programs -> Startup and click on 'Winlogon'.

Addresses for Internet Explorer

If you do not have icons for these, you can paste these url's into the address bar in Internet Explorer:

Advice Sheffield - http://www.adviceshefffield.org.uk/
Advisernet - http://www.cabadvisernet.org.uk/
Petra Live - http://cabcrmlive.cabsrv.org.uk/
Petra Training - http://cabpu-crmweb1.cabsrv.org.uk/training
Nellbooker- http://www.nellbooker.net
E-mails – http://mail.office365.com

Managers' Responsibility for Users

Managers and supervisors have some responsibility for IT issues for those that they manage or supervise.

New Users

If you have a new member of staff starting then you will need to have our IT contractors, ESP Projects, set them up as a new user.

You do this by completing the ESP new user form which is an appendix to this guide, or you can find it in Z:\Administration\IT\New Users or from the IT Lead/Network Manager .

Unless you know what should go on this form regarding access to folders etc, you may wish to ask the IT Lead/Network Manager to check it and forward it to ESP.

When users leave

When a user leaves, you will need to decide what happens to their personal folder and to their emails, and to complete a delete user form to remove them from the system. You need to send ESP a delete user form which is an appendix to this guide, or you can find it in Z:\Administration\IT\New Users or from the IT Lead/Network Manager

Your options are to:

a. Keep the account live to enable you or another user to log on to the server as them and access their documents and emails. You delay in sending the 'delete user form'. However, you must ensure that ESP are asked to change their password first. You must also take other action to delete their account no more than 3-6 months later; or
b. Delete the user. This will involve ESP
    i. Moving their personal folders – these will appear as a new folder on the desktop of the user nominated on the form.
    ii. Archiving their emails. They will go to the Archive folder on the server. The Network Manager can enable another user to open this file; and
    iii. Redirect incoming emails to another users inbox, if indicated on the delete user form.

Documents and emails could go to a manager or, for instance the new postholder. They could thus get the redirected emails and archived emails when they start.

Saving to Z Drive – “Company”

We are saving documents on the shared Company Drive. As there are a large number of users, it is important to save things logically or things would get very disorganised very quickly.
You should first of all decide whether you need to save on the shared drive. Normally casework and personal documents can be stored – temporarily for casework – in My Documents.

However, if you are a manager or administrator you might need to save things where they can be shared.

Additionally, you might be told to look at a document on the Company Drive. The table on the following page sets out where you can find things on the Company drive. You may not see or be able to access everything. This is because some folders are only accessible to managers or finance staff etc., because they are confidential.

Additionally, we are developing an ‘intranet’ – an internal web site which will be the main place for you to access Company documents and information – from timesheets to sickness and supervision forms to policies and procedures.

Top Level folder	Sub-folder (e.g)	Accessible by	*Description*
ADMIN	Admin	Senior Management, Management and Finance staff	*How we manage the organisations resources*
	Equipment		
	Insurance		
	IT		
	Phones		
	Premises		
	Utilities		
ADMIN - OPEN	Admin How to	All users	
	Admin resources		
	Site		*Admin specific to a site*
	Templates and forms		*Admin Document Templates*
ADVICE INFORMATION	Subjects Our Info and Leaflets	All users	*info for advisers to use in casework.*
	Templates		*Standard documents*
EXTERNAL RELATIONS	Organisations	Senior Managers, Managers and Social Policy staff	*How we relate to the outside world – including campaigns and publicity not connected with a project.*
	Issues		
	Media Work		
	Strategic		
FINANCE		Senior Management and finance staff	*How we manage the organisation's money.*
FUNDING *For money coming in – as opposed to how we manage money we receive, which will be in Finance*	Bids	Senior Management, management and finance staff	*Bidding documents saved in sub folders for successful, unsuccessful and pending e.g. IFC 2012*
	Current Funding		*(Covers relations with the funder over the income, agreements, external relations*
	Past Funding		*As above*
GOVERNANCE *How we manage decisions in our our own organisation*	Closed-	Restricted to Senior Management]	*For confidential Board and Management committees and dealings with Charity Commission, Companies House*
	Open	Read only for all users	*Office Manual*
			Staff Meetings
			Open Board Minutes

Top Level folder	Sub-folder (e.g)	Accessible by	*Description*
HUMAN RESOURCES	Staff files *(where not replaced by Simply Personnel)*	Senior Management, possibly select Management and Admin staff	*Documents about confidential staffing matters*
	Recruitment		
	Job Descriptions		
	Contracts		
	Reference (*e.g. pay scales, info*		
HR – Volunteer Support	Introduction talks Application forms References Templates Volunteer Database	Management, Senior Management and Volunteer Support Workers	*For the administration of volunteering.*
ARCHIVES	CLASSY	Only accessible by John Donkersley and Site Manager. Critical stuff will be pulled over on roll out to other folders	*Organisational files from servers etc., from merging organisations*
	Broadfield		
	DASS		
	Wordsworth Ave		
	Stubbin Lane		
	Proctor Place		
	Spital Hill		
	Sheaf		
	SLC		
	Chapel Street		
	Bawtry road etc		
PROJECTS [Access defined at sub-folder level]	**Current Projects** This is for operational information on running the project or subject area or for client's files for an individual site. Relations with funders will go in the Funding folder.	e.g. Adviceline	*For storing operational information about separately funded projects or areas of work.*
		MH Advice	
		MH Advocacy	
		F2F	
		RHP	
		IFCS	
		Legal Aid	
		Training	
		RHP	
		Gypsy & traveller	
		Wordsworth Avenue	
	Past Projects		
VOLUNTEER		All users	*Special folder for volunteers instead of a 'my documents' folder.*

Connecting from outside the office

Key users who are on outreach or allowed to work from home, may be authorised to connect to our network over the internet.

You can only work from home or outside the office on a regular basis if authorised to do so (see section below).

You can do so only if the internet connection is a trusted one in another organisation – you should not use public wi-fi hotspots etc. Additionally, the computer you use should be password protected and not used by anyone else.

You will have been given a remote desktop connection file [RDGateway01] to place on your desktop.

How to start your remote desktop connection
Double click on the remote desktop connection file you have been given.

When the connection is being established you will get this box.

Tick 'Don't ask me again for connections to this computer" then 'Connect'.

You will then get a log in screen that will look something like this:

If your user name is not already there then add it in the format: SCALC\Firstname.Surname.

Add your password (which is the same as logging on in the office), and this will start a server desktop session.

Click 'OK' and your desktop should appear.

What if it does not connect?

You may be on a network or on a PC or laptop that does not allow remote desktop connections. This can be caused by a variety of things – such as firewall settings on the PC, on the router connecting to the network or on a server. We are not able to support

Can I print during a remote connection?

Your remote session will attempt to pick up your printer settings from your computer. This often works, but not always, and unfortunately ESP cannot support printer connections outside the office. We also reserve the right to change your connection to stop a printer being used, if driver issues cause a problem for the server.

Can I use memory sticks or access the hard drive on the computer I am using during a remote connection?

For security reasons this is disabled by default. If you need to enable this for reasons related to your work, contact your manager for authorisation, and they will ask the Network manager to arrange this.

Any memory sticks or portable storage which is used to carry data with personal information (e.g. on a client or member of staff or that is sensitive commercial information for the organisation) must be encrypted to a standard known as FIPS 140-2. This will usually be provided by SCA to you.

When using a memory stick you should normally insert if *after* you have started a server session. If it has encryption, then you may need to minimise your server desktop (click the minus icon on the blue bar) then enter your password. You then need to click on the icon in the Taskbar to see your server session again: - -

You can copy from you're an authorised USB stick inserted into your PC to the server session. This is done by

- minimising your server session, then
- clicking exit on the white ESP menu
- opening the folder for the files you need on the USB drive you have inserted
- highlist the file you want to copy (single left-click)
- right click and select 'copy'
- maximise your server session by clicking on the computer icon on the taskbar
- in the server session open the folder where you want these files to go
- right click on a blank area in the folder
- select 'paste'.

Working from Outside the Office

To work from outside the office, using remote desktop or webmail, you must get authorization to do so. A site manager or senior manager only can authorize this, and must advise the IT lead and Resources Manager before it is approved. This section deals only with the ICT implications.

The Manager must consider the BMIS guidance on home working . This would include

- Resolving HR issues that they may need approval for from the Resources Manager or Chief Executive.
- Discuss with the IT Lead (and through them with ESP) what ICT equipment and/or connections they will need and who will pay for this.
- The manager must visit the home to carry out a risk assessment. They should ensure that the place of work and practices will comply with SCA policies and practices (e.g. information assurance and health and safety). The report on the risk assessment must be sent to HR for storage on the personnel file.

The ICT issues that both manager and staff member must ensure are addressed are:

- Any wireless internet connection used must be confirmed as using WPA2 encryption, to prevent hacking. No official work shall be carried out from a public wi-fi hotspot;
- Any desktop computer or laptop must be password protected with an account on it for which the staff member only has access and a password;
- Any laptop used must be encrypted using Truecrypt or better;
- No personal data (and ideally any work documents at all) should be stored on the computer used, and this should instead be worked upon in the remote desktop session only.
- No USB drives or other removable storage should be used to save information, except where this is authorised e.g. using an encrypted drive (see this section).

Users authorised to connect from outside the office shall be supplied with a file to copy to the PC that they use. Double clicking on this file will launch the connection.

Webmail and Calendar

You can also, if authorised, look at and send e-mails from a computer connected to the internet.

You can do so only if the internet connection is a trusted one in another organisation – you should not use public wi-fi hotspots etc. Additionally, the computer you use should be password protected and not used by anyone else.

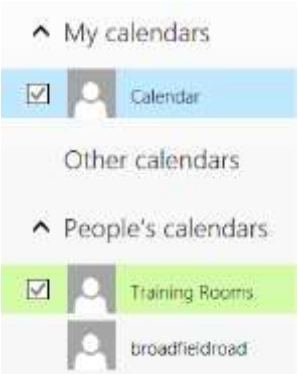
You should put http://mail.office365.com into your browser and then use your full e-mail address and password to connect.

You will also be able to see your calendar and tasks this way. Your calendar – and any shared calendars - are not in the same place as the desktop version of outlook. To view your calendar from webmail:

1. Connect to webmail
2. Click on the Office 365 wording in the top left corner

3. You will then see a window with different apps. Click on Calendar.

4. From the window that appears afterwards, you will see your own calendar and can click on 'People's Calendars' in the sidebar on the left to view Calendar's you already have permission to view.



Using a Smartphone

You can, if authorised, use a smartphone to access your e-mails and calendar.

Android phones

1) In Android phones, click on your 'mail' icon. If there is not already an e-mail account there you will be invited to choose a mail provider.
2) Select Microsoft Exchange ActiveSync;
3) You should enter your Email address firstname.surname and password.
4) Press next and accept the security certificate if asked.
5) This should automatically set it up. If it does not then go to stage 6.
6) In the 'Set up…' screen that appears, select manual set up.
7) Under server address enter pod51050.outlook.com
8) Leave the domain name free.
9) In the user name put your full e-mail address.
10) Add your password
11) Ensure 'This server requires an encrypted SSL connection' is ticked.
12) Click next.

You should be asked automatically to set up security on your phone so that you have to enter a password or similar to access it, if not already set up.

You can alter your settings so that e-mails are sent to your phone as soon as they are sent, but otherwise your phone may default to every three or five minutes.

Android devices and other phones can vary in how they operate and we cannot guarantee that we can support your device.

Other than e-mails, smartphones cannot be used for temporary storage of any personal information on a client or member of staff unless

- *authorised* AND
- the phone is password protected AND
- the phone is 140-2 FIPS compliant. Currently this is only:
  - *Apple iPhones with iOS6 or 7,*
  - *the Blackberry using Blackberry Secure webspace*
  - *Windows Phone 8 and*
  - *Samsung S2 and S4.*

Getting Help

With what issues will Citizens Advice ICT Service desk help?

If contacting Citizens Advice ICT Help Desk please let them know that you are working in a *remote desktop environment*.

Citizens Advice bespoke applications

If you experience a problem with these, but can still access Cablink – check the following page first - http://www.cablink.org.uk/index/technology/it_systems_status.htm

- Petra – anything to do with how Petra works once you get access. If you cannot log on, approach your site's Petra administrator who may be able to help you with your log-on
- AdviserNet access and content
- CASE (support ends 31st March 2014)
- CABlink access and content
- BMIS access and content

Other support

- General help with how to do something on a computer, excluding our network connections
- Diagnosing whether a fault affecting any of the above is due to their systems
- Help with Microsoft Office – especially when this relates to how it works with Petra
- Issues with Webroot antivirus, or if they notify us that a virus has been found
- The speed of connections with their network

How do I contact them?

See: http://www.cablink.org.uk/index/technology/ict_support.htm

- Telephone: 0300 5000 400 and select option 1
- E-mail: support@citizensadvice.org.uk
- Fax: 01793 699001

(information correct as at 13.03.14)

With what issues will ESP's Service desk help?

Note the term 'Network manager' is used to describe the SCA staff member with responsibility for liaising with ESP. This will be set in due course.

- The remote connections to the central server
- Loss of the internet connection to an office (though the Network Manager may have to contact the broadband provider if requested to do so by ESP)
- E-mails not being available
- Problems with access to the shared company drive
- Your computer is faulty
- Problems with the set-up of certain key databases of which you are an approved user (IRIS, volunteer database, Simply Personnel, Quickbooks) but not how to operate these programmes as this is the responsibility of the user or the software vendor.
- New users or changes in their location or folder access (there is a new user form for managers to send through to them to set up a user account and e-mails – use this rather than ringing)
- Shutting down the accounts of users who no longer work or volunteer with us
- Viruses and spam
- Deploying equipment – but only once purchase and deployment has been agreed with the manager responsible for IT. This can include deploying drivers for new equipment and sharing it on the network.

What do I need to put get approved by the network / IT / site manager before contacting ESP?

- If it may involve a site visit, then your site manager needs to approve the work first
- Any form of IT order or purchase
- Installation of encrypted filesystems on a new laptop (this must be in place for any laptop used to access Petra or personal data of a client or employee)
- A request for ESP to install equipment on site as this may involve labour costs
- Any request for consultancy on an IT solution, because we have a limited number of hours of free consultancy. This needs to be approved by the IT Manager.

How do I contact them?

E-mail: support@espprojects.co.uk

If the problem is urgent: ring 0114 276 3909 – option 2

(information correct as at 13.03.14)

Who else might help?

- If you are unsure about who might be responsible for an IT issue, then talk to your Site Manager or to the Network Manager, who can give you guidance or liaise with the right help desk.
- Software licenses or validation may need to be checked with the Network Manager, who holds a record of the software licenses that we have bought
- If you have a problem with Casetrack for the Legal Services Unit, then please route issues through Anne Hudson, in the first instance.

IT do's and don't's

Do:

- Fill out a new user form (and read the guidance) then send it to ESP when you have a new staff member start (Manager's only)
- Tell the Network Manager before moving a PC, monitor, printer or scanner – we maintain an asset list that will need to be updated
- Tell us if you have an IT problem that is preventing you working
- Contact the Network Manager or training department if you need equipment to do a presentation off site – we have laptops, data projectors and screens that can be borrowed.
- Report any suspicious activity or e-mails to your manager.
- Set up a standard Sheffield Citizens Advice standard e-mail signature for your e-mails going outside the organisation.
- Ring ESP immediately if you get a virus warning.

Don't:

- Install any programs on your work computer without authorisation from the Network manager.
- Connect a memory stick or insert a DVD or CD, or connect a smartphone, MP3 player etc without getting it approved by a manager. It should be checked for viruses first (some training department laptops are on protected network and this can be approved by the Training Manager).
- respond to emails or phone calls requesting confidential company or client information without asking the caller for information to confirm identity
- Use an unprotected computer when you connect to webmail or to our network. This includes an internet café or shared machine at home. Any computer should have all updates installed, a firewall and anti-virus solution, and be protected by a secure password
- Open e-mail attachments or any other files that are not from a trusted source that you are expecting

Password Do's and Don't's

Do:

- Remember to change your Petra password which expires after 60 days
- Make sure you know what the local machine log-in is for the computers at your office. This also changes on the first working day of each even month (February, April, June etc)
- Lock your computer (ctrl+alt+end > Lock) when away from your desk (or phone if you have company e-mail access through this)
- Protect any sensitive files with passwords.
- Use a hard to guess password which must contain upper and lower cases, figures and punctuation.
- Use different passwords for different sites or log-ons. Your password for Petra and for your SCA user log-on must be unique!

Don't:

- Save any passwords when you log on to our network or to Petra

- Tell your password to anybody else, even if they work here!

Standard SCA E-mail Signature

You should insert the standard e-mail signature in all external e-mails.

To do this

1. Open Outlook.
2. Click to compose a new e-mail
3. Select 'Signature' in the ribbon, then 'Signatures'.
4. In the dialogue box click on 'New' and name the signature something you will remember.
5. Cut and paste the text of the standard signature below and alter the entries for your name, job title and site address and contact numbers. If the CAB logo does not transfer you may need to cut and paste this separately.
6. Individually registered immigration advisers shall also add, at the end of the section starting with the registered charity number:

   "Authorised by the Office of the Immigration Services Commissioner to provide immigration advice and services - auth. no. N201300063."
7. Select this as your default signature. Ensure that it is used for new messages and whether you want to use this when you forward e-mails.
8. Select 'OK' and you are done.

(Your name)
(Your job title)
Sheffield Citizens Advice, (Site address e.g. The Old Dairy, Broadfield Road, Sheffield S8 0XQ)
Tel: (e.g. 0114 250 1144) Fax: (e.g. 0114 258 1336)

www.adviceshefield.org.uk

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Outlook 2010 - Sharing Your Mailbox, Calendar etc

[With acknowledgements to University College London from which this was adapted]

You may wish to grant a colleague access to your Outlook mailbox including your Inbox, Sent Items and Deleted Items folders. For example, an adviser who requires a colleague to share their calendar in case they are off sick, or to share a calendar for an office's interview rooms.

To do this, both the 'sharer' and the 'sharee' both need to change some settings in their accounts. Please follow the stages carefully below. **Do not skip any stages or steps**.

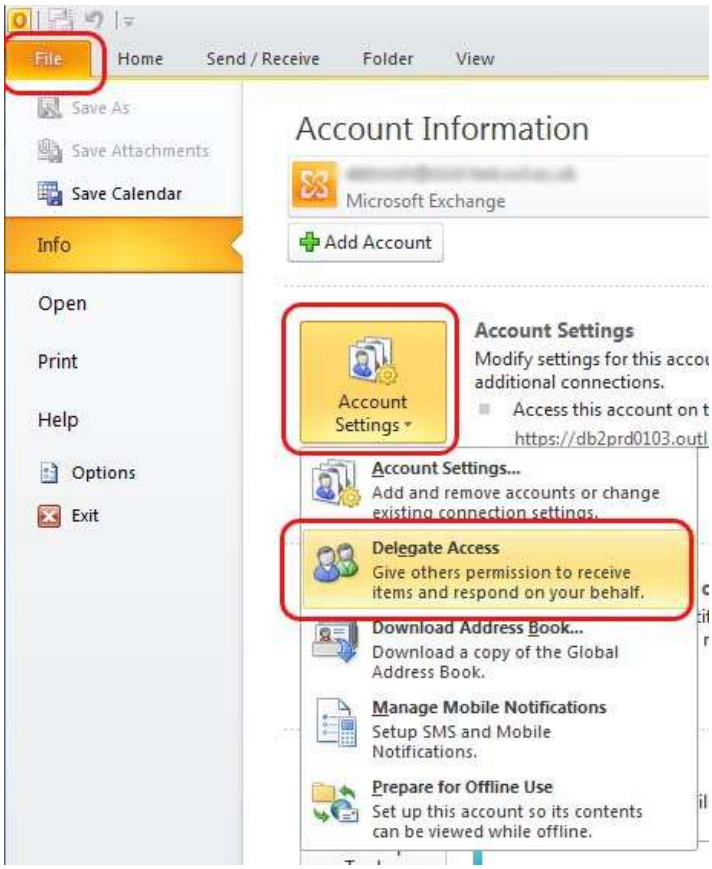
Stage 1. Granting delegate access

- Stage 2. Granting folder access
- Stage 3. Viewing a colleagues Mailbox
- Stage 4. Points to remember

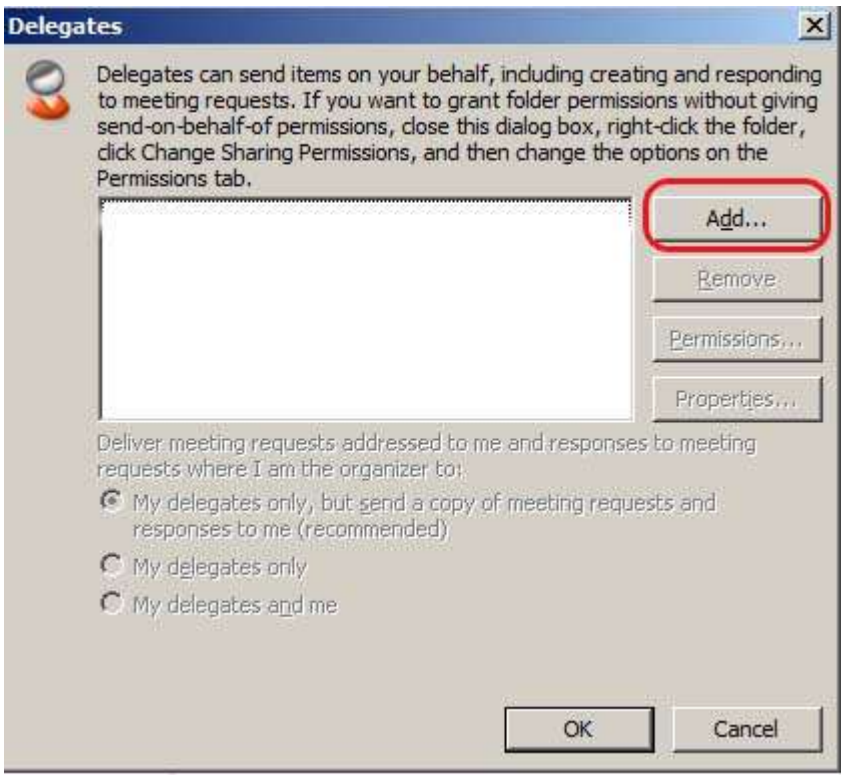
Stage 1. Granting Delegate Access

Please note: The person who wants to **share** their Mailbox needs to follow Stages 1 and 2.

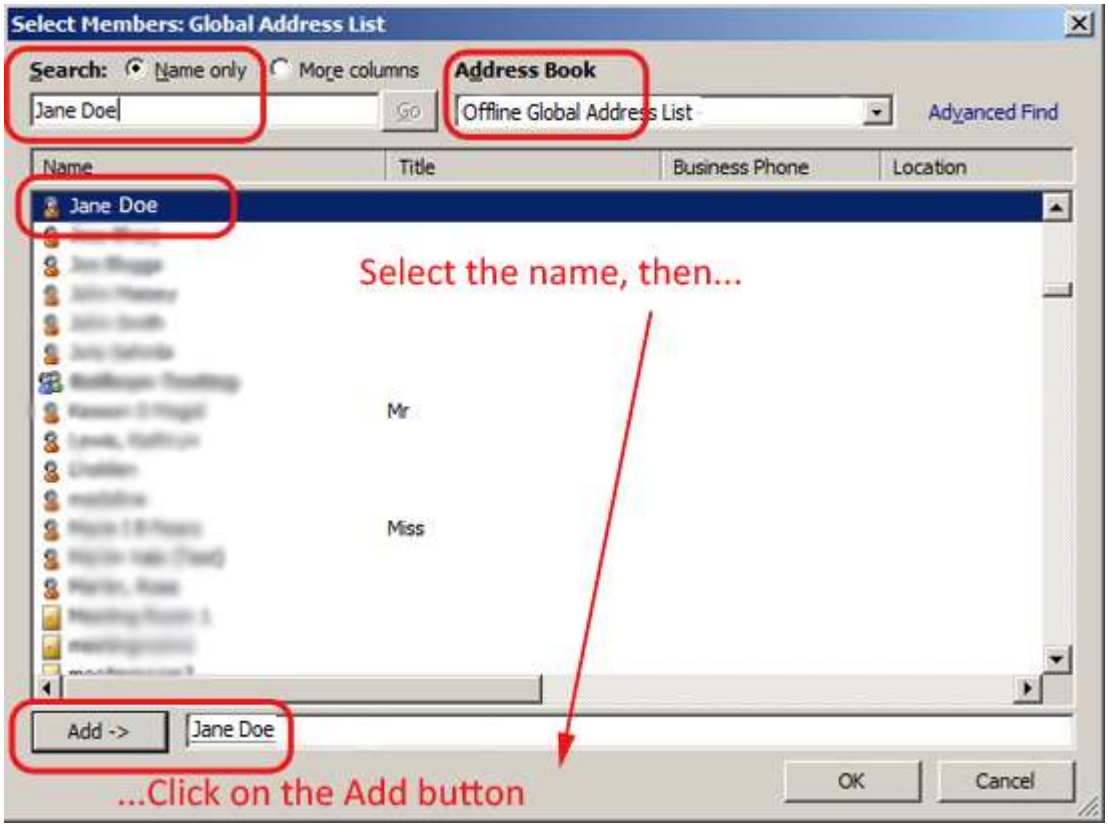
Step 1. To add delegates to your account, navigate to **File** > **Info** > **Account Settings** > **Delegate Access**.



Step 2. In the Delegates window, click the **Add button**.

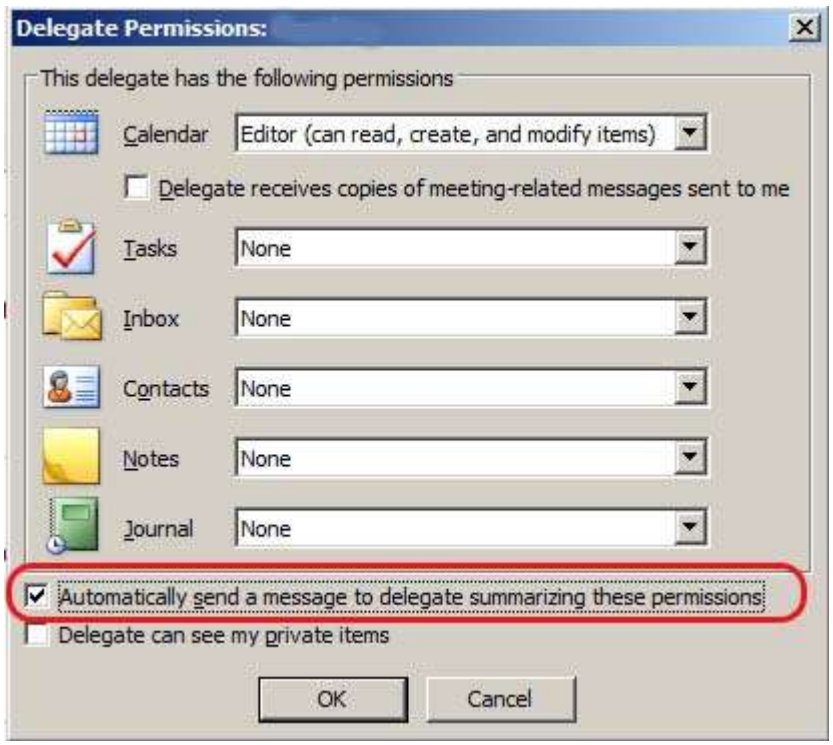


Step 3. In the **Global Address list** that appears, find and select your colleague's name with whom you want to share your Mailbox. Either double-click their name or click on the **Add** button in the bottom left hand corner.



Step 4. Once selected click the **OK button**.

Step 5. The **Delegate Permissions** window will open. You will notice all **permissions** are set to **none**(unless you have previously granted calendar permissions, in which case your previously selected options will be remembered).



Click on the down arrow next to each item (E.g. Calendar, Tasks, etc) and select **Editor**. This will grant your colleague full Editor access. However, you can choose which options suit you depending on your requirements for the delegate.

Tip! Each permission has a brief explanation as to the level of access in brackets. (Note that only **Inbox** permissions at an **editor** permission level are required if you would like the delegate to be able to send emails on your behalf.) The rest are purely optional dependant on how extensively you use Outlook 2010.

Step 6. Tick the check box at the bottom of the window "**Automatically send a message to the delegate summarizing these permissions**" to do exactly that. An email will be sent to your colleague informing them of their new access rights to your account.

Click **OK** when done.

Step 7. Your colleague will now be listed in the **Delegates** window. Select the desired radio button to choose where to send meeting requests.

The top option is the recommended and most common choice: **My delegates only, but send a copy of meeting requests and responses to me (recommended)**.

Stage 2 - Granting Folder Access

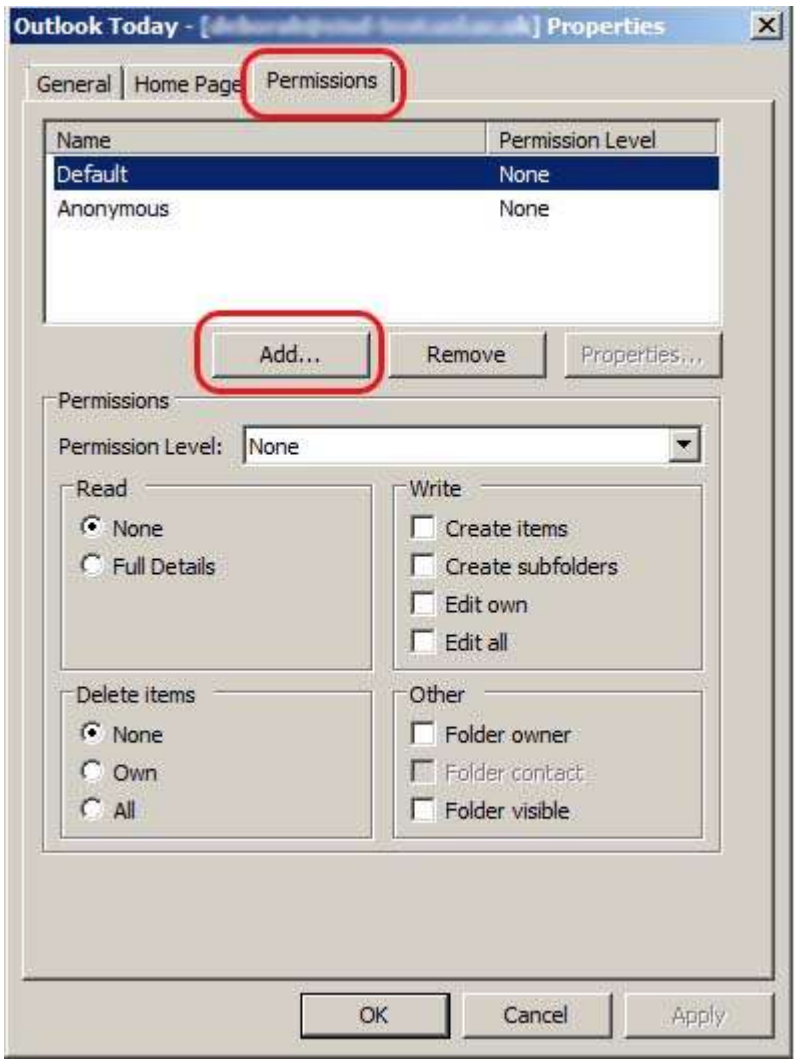
The next stage is to grant folder access to your delegate. Following these steps will enable you to customise what folders you would like your colleague to actually see from within their own account.

Step 1. In the navigation page, navigate to your **Mail** view. Right-mouse-click on your mailbox name, located at the top of the navigation tree. From the pop up list, choose **Folder Permissions**.

Tip! As this is the mailbox, we need to grant permissions here first. **This is paramount.** We will then go on to grant permissions on additional folders underneath the mailbox.

Step 2. The next screen you will see is the **Mailbox Properties window** and Outlook should direct you to the **Permissions Tab** automatically.

Step 3. Click the **Add** button



Step 4. This will open the Address Book window.

Locate the delegate you added in Stage 1. Once you've found them either double click their name or click the **Add** button to add their name to the box at the bottom of the window.

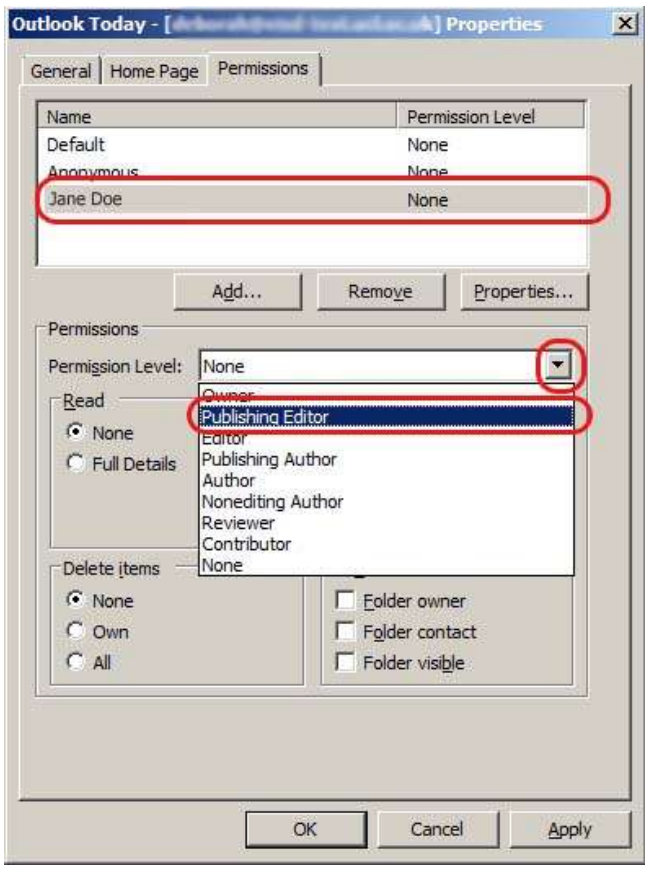
Click **OK** when done.

Step 5. You will be returned back to the mailbox properties window. Click on the delegate's name to highlight it, and from the box next to **Permission Level**, select the permissions required for this delegate.

For full access, use **Publishing Editor rights.**

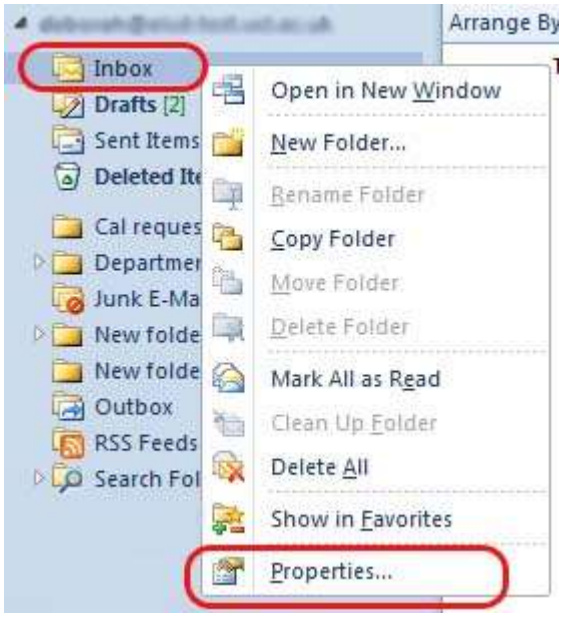
Although Reviewer rights enable the delegate to be able to access everything within your mailbox. Publishing Editor rights can allow them:

- Full Read access to email,
- Modification rights to the mailbox structure including creating sub-folders
- Full Delete capability



Step 6. Click **Apply** then **OK** when you have made your choice.

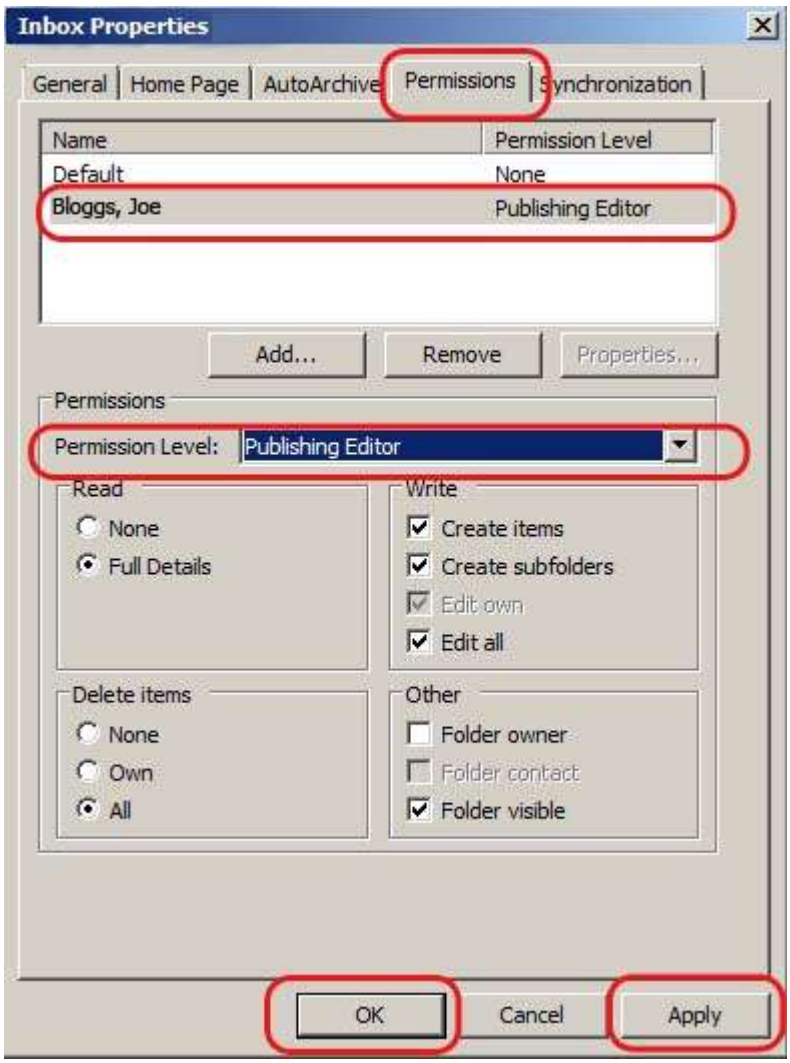
Step 7. Outlook will take you back to the Mail window. You will need to repeat the process for the **Inbox**. Right-mouse-click on the **Inbox** this time, and choose the **Properties** option.



Step 8. This will open the Inbox Properties window. Select the **Permissions** tab.

Please note: In the case of the Inbox, you will notice that the delegate is already present within the permissions box. This was because when we gave them delegate access in **Stage 1**.

Select the delegate and change the permission level to Publishing Editor.



Click **Apply** and **OK** when done.

Repeat the above process for any additional folders you would like the delegate to see within their own email account. For exampleSent Items and Deleted Items.

IMPORTANT:

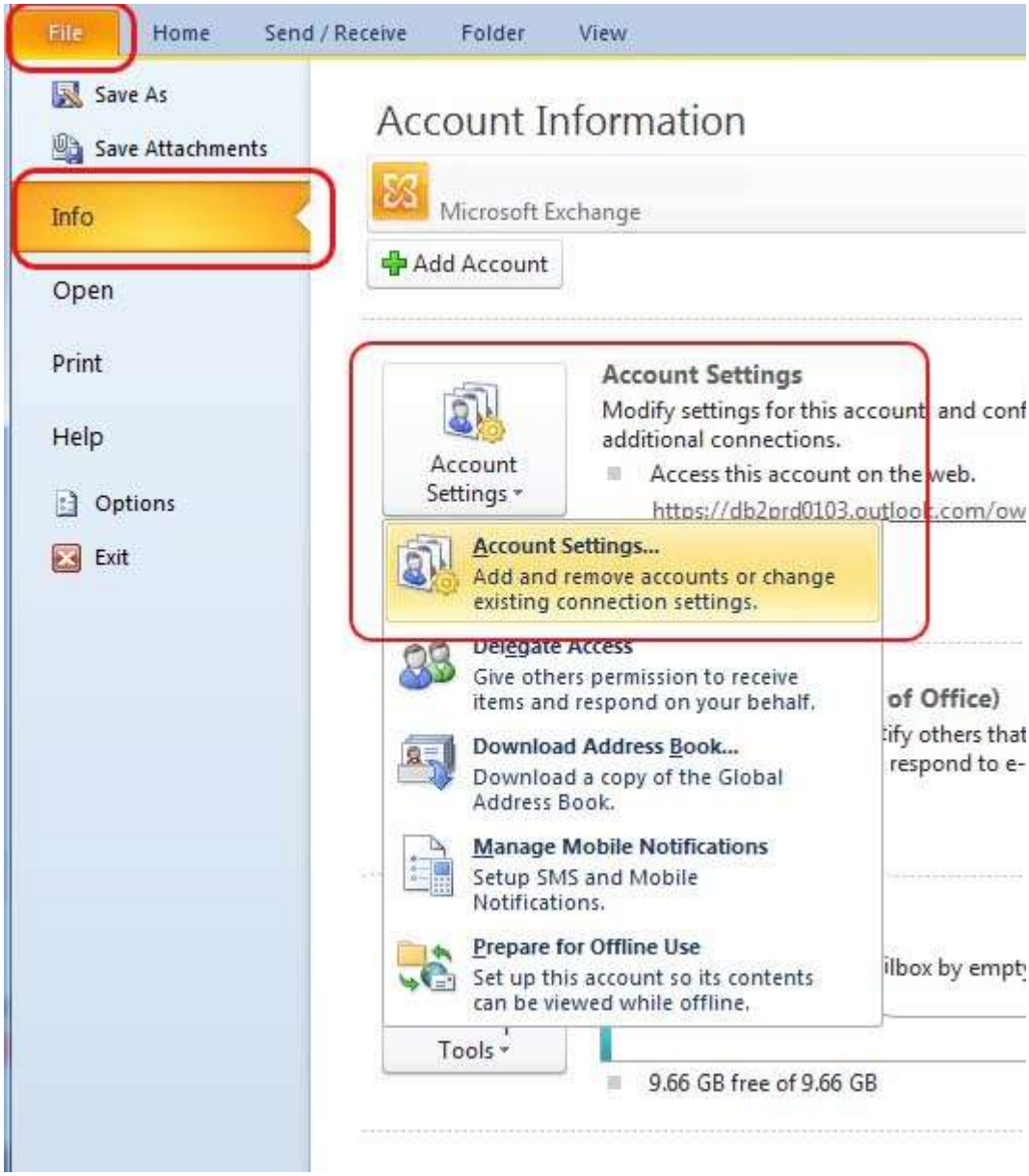
- You have now completed the two stages required to grant access for another colleague to view your mailbox. Now ask your **colleague** to follow the steps for **Stage 3** - Viewing a colleague's mailbox.
- **Please note**: Any **NEW** folders that you create will also be seen by your delegate(s). This is a feature of Outlook 2010. OLD folders are not affected. If you wish to keep any NEW folders that you create private, right click on the folder, select **Properties** and the **Permissions** tab. Remove the delegate(s) by selecting their name and click on the **Remove** button

Stage 3. Viewing A Colleague's Mailbox

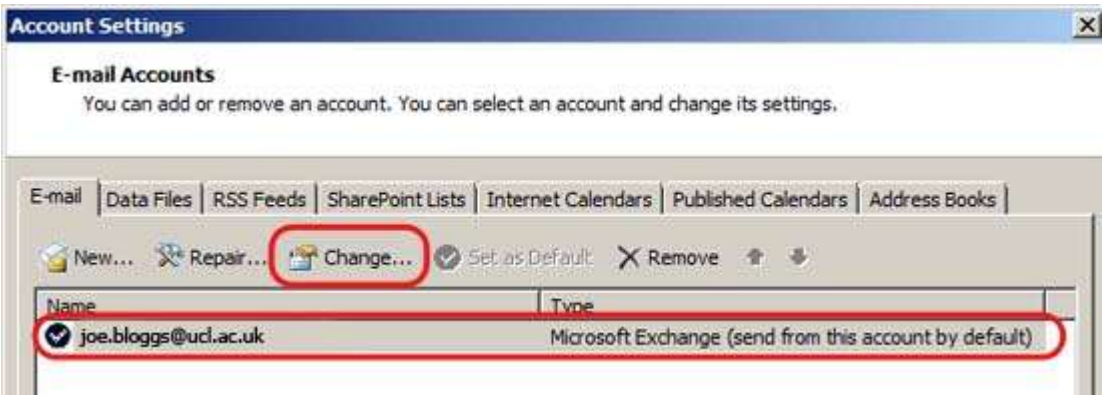
IMPORTANT: Before attempting to follow these instructions, please ensure that the owner of the mailbox you wish to see has granted you delegate and mailbox access - as described in **Stages 1 and 2**.

Dependant on the permissions you've been granted by your colleague in Stages 1 and 2, you may now be able to **read/modify/delete and send on behalf** of the email account owner.

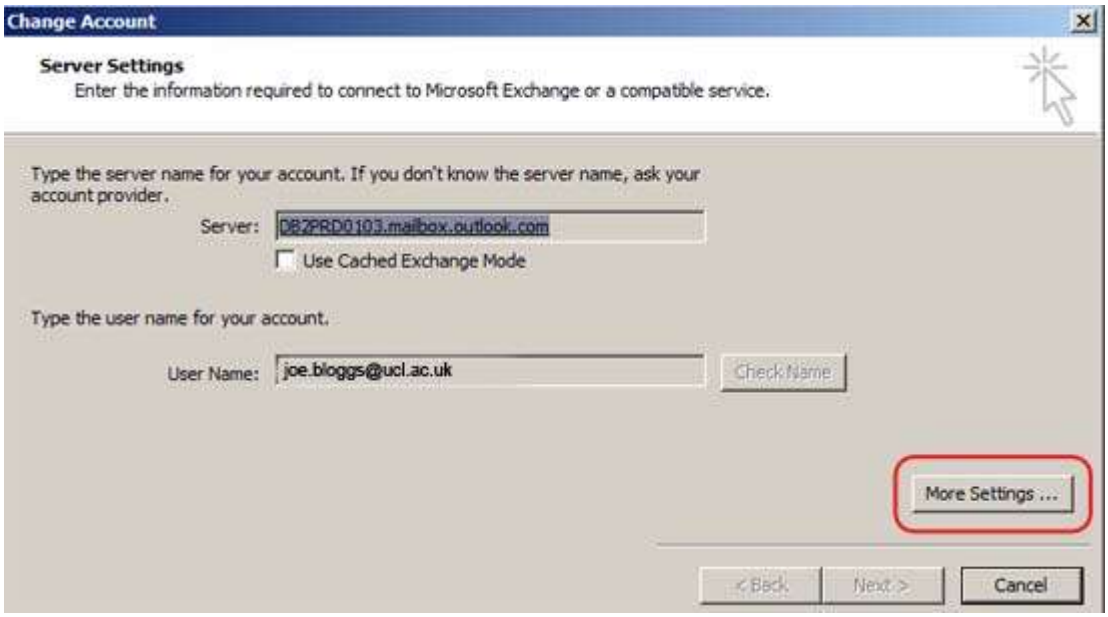
Step1. Within your Outlook account navigate to **File** > **Info** > **Account Settings** > **Account Settings**.



Step 2. Highlight your Microsoft Exchange account and click the **Change** button.

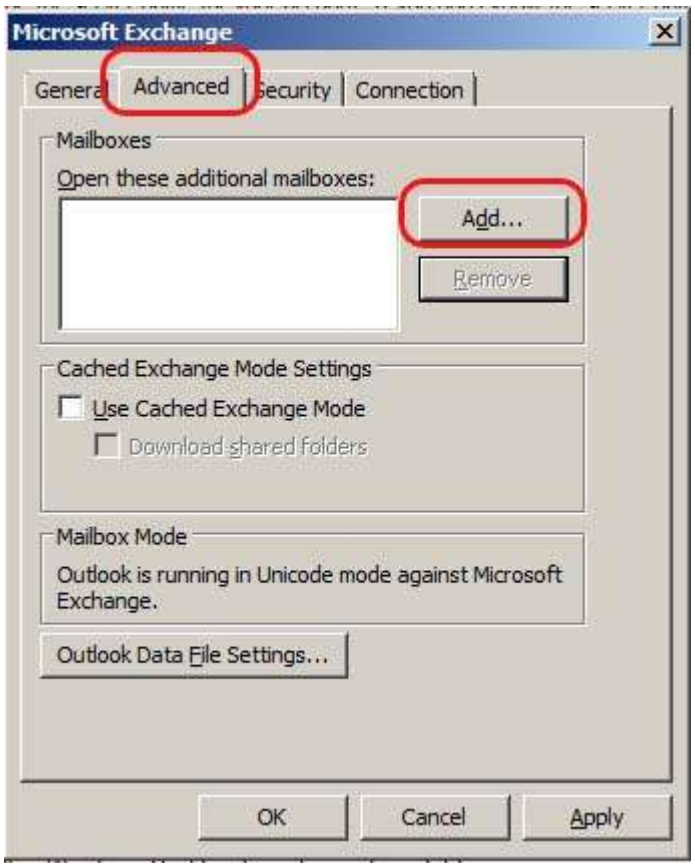


Step 3. Click the **More Settings** option.



Step 4. Within the MS Exchange Window click the **Advanced Tab**.

Step 5. Under the **Mailboxes** section click the **Add** button to add the additional mailbox you have access to.



Step 6. In the **Add Mailbox window** type the name of the owner of the required mailbox.

Click **OK**.

Step 7. Click **Apply** and then **OK**.

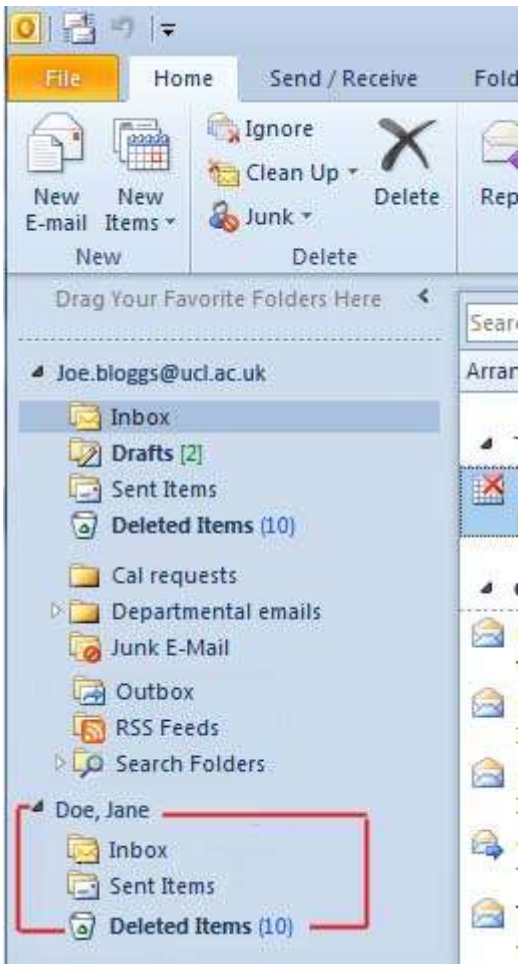
Step 8. Navigate your way out of previous windows by:

- clicking **Next** on the **Change Account** window
- and then **Finish**.
- Click **Close** on the **Account Settings** window.

Step 9. Close and re-start Outlook.

Step 10. When you have re-started outlook. Click on the **Mail** button in the Navigation pane. In the folder list, you will see the additional account you just added underneath your own.

To expand the new account and display the additional folders that you were given access rights to, click the small triangle next to the mailbox name .



You have now been successfully granted Delegate/Mailbox permissionsand opened an additional Mailbox within your

email account.

Points To Remember

If you have followed the steps above but still think you have gone wrong somewhere then remember the most important points below.

- It is paramount that Permissions are granted to the Mailbox **FIRST** and additional folders like the inbox/sent items after. Failure to only grant permissions to the inbox sent mail and deleted items will mean the mailbox cannot be opened as an additional mailbox.

- Delegate Access to the Inbox (minimum editor Level) is required for **"Send on Behalf Of"** rights to another mailbox. Basically enabling you to send email on behalf of another.

- Check the permissions you have granted and make sure that neither too little or to much has been set.

ESP Projects Ltd: IT Support - Sheffield

New User Form

Personal Details

First Name	
Last Name	
Telephone Number	
Office	*[e.g.Broadfield Road]*
Job Title	
Department	

User Details

Password (If left blank this will be set to 1234pass!)	
Email Address (If left blank, no email will be setup)	*firstname.surname@sheffieldcitizensadvice.org.uk*
PC or Laptop User?	
Any Other Person With Similar Permissions?	*[this helps ESP give the new user the same permissions and folder access as the other user]*
Specific Folder Permissions?	*[Insert any specific permissions e.g. to Legal Aid folder, or to databases such as Casetrack, Quickbooks etc. An adviser would normally also have Advice Information, Admin-Open,*

	Scans].
Permissions for Additional Mailboxes?	
Any Additional Equipment required? (Laptop, PC Etc.)	*[You will need approval from the Network Manager/IT Lead to order this]*
Any Shared Calendars that they need access to?	*[E.g Broadfield Road or Duke Street shared calendar]*

New User Configuration

So you have sent through a new user form to ESP Support and have received a reply saying that they have been setup.

The next steps are to get the user setup and working on a PC in your office.

Once you have logged in with the username and password that ESP provided you with, you want to setup Outlook, check permissions are working on the company drive and configure Intranet access where applicable.

Open A Shared Calendar - http://esphelp.co.uk/blog/2010/09/01/outlook-2003-view-a-shared-calendar/

Tel No: 0845 4657229
Email: support@espprojects.co.uk
Twitter: @espprojects

ESP Projects Ltd: IT Support - Sheffield

Delete User Form

Personal Details

First Name	
Last Name	

User Details

Username	**Enter Username Here**
Email address	**Enter Email Address Here**
Who should take ownership of their files?	**If left blank files will be deleted**
Archive or delete old Emails?	**If left blank emails will be deleted**
Who to send future Emails to?	**If left blank emails will not be forwarded to anyone**

.* Files will be placed in the root of the nominated user's "My Documents" and archived emails will be stored in Company\Archives\User_Archive

Tel No: 0845 4657229 **Email: support@espprojects.co.uk**

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Main Tel: 0845 4657229
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We Buy Social. We're supporting values that match our own We're increasing sustainability within the movement We're growing the social economy We're creating social value We're keeping our money in communities Why not get a new social enterprise into your supply chain?	DO A GREAT DEAL BUY SOCIAL
You can learn more about the Buy Social campaign here: http://www.socialenterprise.org.uk/policy-campaigns/campaigns/buy-social or by following hashtag #buysocial on Twitter	