

Microsoft 365 Add-In Guidance



1 Guidance Statement

- 1.1 The aim of this guidance is to reduce the risk of the Council being non-compliant with relevant legislation, such as the Data Protection Act 2018 (DPA).
- 1.2 The guidance applies to all Employees who have access to Microsoft 365 on a Council device, including full-time, part-time and temporary employees, agency workers, and consultants.

2 What are Add-Ins?

- 2.1 Add-Ins are Third Party Applications that can be made accessible via Microsoft 365, for example Slack, Trello, Zoom, etc.
- 2.2 They may sometimes offer different functionality to that of the Council default Microsoft 365 Applications.
- 2.3 When installed they will be accessible directly from Microsoft Outlook or Teams but are not operated within the Council's secure Microsoft environment.

3 When should Add-Ins be used?

- 3.1 Add-Ins should only be used as a last resort, where the equivalent Microsoft 365 Application, such as Teams, does not provide the functionality needed.
- 3.2 Some Add-Ins may enable Council employees to interact with external organisations more easily, for example if a Council employee is invited to an external meeting being hosted via Zoom.
- 3.3 Additional caution should be taken as Third Party Applications are not operated within the Council's secure Microsoft environment.

4 Additional Caution

- 4.1 Employees should avoid sending or discussing personal data via Add-Ins and should not screen record meetings attended or held in such applications.
- 4.2 Any information processed within Add-Ins is done so by a Third Party and is not backed up by Council systems. The Council has no influence over how data is processed by the Third Party and cannot control its security.
- 4.3 Chat messages and voice or video recording containing personal data sent via Add-Ins, are classed as formal records.
- 4.4 Service users have rights in relation to data protection, including being provided with a copy of information we hold about them, including from any Add-Ins we use.
- 4.5 Right of access searches being expanded to include Add-Ins would put an increased burden on the Access to Records provision.
- 4.6 Employees should register for Third Party Add-ins using their Council email address.
- 4.7 Managers should ensure employees leaving the Authority deregister their Council email address with any Third Party Add-in provider.