Email Best Practices

Dalhousie University is located in Mi’kma’ki, the ancestral and unceded territory of the Mi’kmaq. We are all Treaty people.
Video

If so, keep the content professional & double-check the intended recipients.

Found on Records Management Website under Resources-
Email Content Management Best Practices
Overview

- Intro
- Creation
- Management of Accounts
- Email Triage Chart
- Outlook Features
- Other Resources
Intro - Acts

**FOIPOP** (Freedom of Information and Protection of Privacy Act)

**PIPEDA** (Personal Information Protection and Electronic Document Act)

**PHIA** (Personal Health Information Act)
Intro - Policies

Records Management Policy

Acceptable Use Policy

Policy for the Protection of Personal Information Accessed Outside of Canada
Intro – Protocols & More

Email Protocol

Official email use message found on ITS SharePoint site

Go to ITS site:
IT Polices, Protocol, and Guidelines for even more
Creation

Consider:

- Who you are sending it to
- What information you are sending
- Where it is going to
- Why you are sending it
Who = Recipients

- Reply all?
- The right individuals?
- Would a phone call be better?
What = Content

- One topic = One email
- Personal Information
  - Only send what is required
  - DO NOT Retain these emails and attachments in Outlook
- Keep it professional
  - Language & Tone
- Keep work related → work related
What = Content

**Personal Information Defined**

- name, address, telephone, email (personal not business);
- race, ethnic origin or religious political beliefs or associations;
- age, sex, sexual orientation, marital status or family status;
- any identifying number or symbol (examples: DalCard ID, SIN, credit card, health insurance, drivers’ license);
- fingerprints, blood type, or inheritable characteristics;
- medical or personal history; g. educational, employment, financial, or criminal history;
- personal views or opinions.
What = Content

Inside the Dal.ca domain emails are encrypted.

* But *

When they leave the Dal.ca domain they are NOT.
Why = Function

- Is this an administrative business function of Dal?
  
  Check - DalCLASS

- Can it be sent to a Dal.ca email instead of an external account?

- Is a phone call better?
Management – General

- Emails are subject to FOIPOP
- Outlook is **NOT** a Dal Approved Repository for records storage.
- Think = Transactional Based
- Document the process on how the unit should be dealing with emails
- **DalCLASS** retentions application
- Deletion vs Permanent Deletion
  - Set up trash folder to routinely delete emails
Management – Individual Accounts

- Email Capture – part of workflow
  - Who needs access to the email & when
- Personal Folder
- Leaving Dal or moving within Dal
  - What do you do with the emails?

Student
Employee
& Alumni

Can = Same email account
Management – Shared Accounts

Document the use of:

- Who has what rights and why
- Schedule of - user access review & who is accessing when
- Do the users have the emails forward to their accounts? *(creates unnecessary duplication)*

- Categorize feature
- Folder structure – ex. have a template folder
- Naming convention – subject lines, folders
Email Triage Chart

Email Triage Chart

Received

- Delegate
- Defer
- Transitory
- Respond

- Forward
- Drop into Calendar
- Flag

- Action Required?
  - Yes
  - No but I want it for reference
  - Save it in your OneDrive as a reference

- Yes
- No

- File it in your 'Personal Folder' in Outlook
- Save it in the approved University Provisioned Service

Is it a record?
- No
- Yes

- Do I still need it?
  - Yes
  - Save it in your OneDrive as a reference
  - File it in your 'Personal Folder' in Outlook

Created

- Is it personal?
  - Yes
  - Do I still need it?
    - Yes
    - No

Delete From Outlook
Outlook Features – Cleanup Conversations

Select:

- The email conversation that you'd like to clean up.
- Right click
- Choose > Clean Up Conversation.
- Select Clean Up.
Outlook Features - Setting Rules

Select:

- The Folder you want to save
- Right click
- Choose > Properties
- Select > AutoArchive
- Then > Archive
- Enter the time frame and location you want them to be saved to. Then Apply
Other Resources

- Percipio email tutorial
  
  www.dal.percipio.com

  Search terms:
  - ‘Outlook’
  - ‘Outlook 365’ (online version)
  - ‘Outlook 2016’ (desktop version)
Other resources con. - Percipio
Other resources con. - *Percipio*
Other resources con. - Persipio