Email Best Practices

With the Records Management & Privacy Offices

DALHOUSIE
UNIVERSITY

Acknowledgements

Dalhousie University operates in the unceded territories of the Mi’kmaw, Wolastoqey, and Peskotomuhkati Peoples. These sovereign nations hold inherent rights as the original peoples of these lands, and we each carry collective obligations under the Peace and Friendship Treaties. Section 35 of the Constitution Act, 1982 recognizes and affirms Aboriginal and Treaty rights in Canada.

We recognize that African Nova Scotians are a distinct people whose histories, legacies and contributions have enriched that part of Mi’kma’ki known as Nova Scotia for over 400 years.

Overview

- Intro
- Email IT
- Creation
- Management of Accounts
- Dal Resources
- Microsoft Outlook Features & Training
- Other Resources

Intro

Presenters

Records Management Office

&

Privacy Office

Courtney Bayne,

University Records Manager

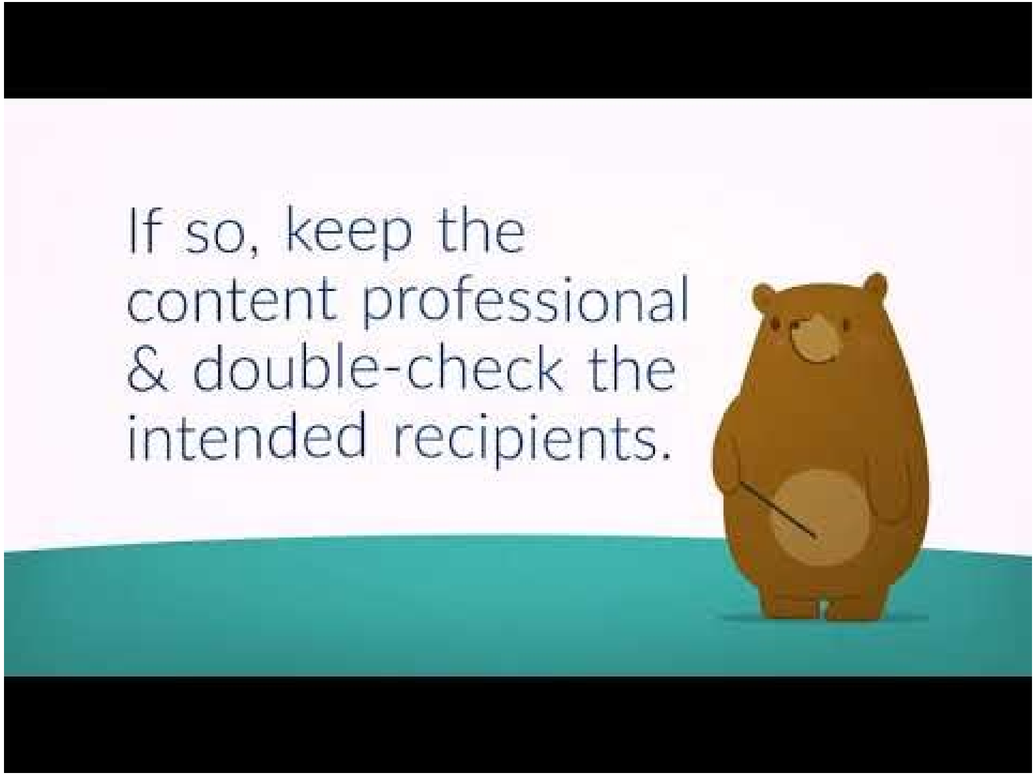
Guy LeLievre,

Records Management Assistant

Melinda Frelick,
Privacy Officer

Brenda Williams,
Access & Privacy Specialist

Intro - Video



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

Intro to Acts

FOIPOP (Freedom of Information and Protection of Privacy Act)

PIIDPA (Personal Information International Disclosure Protection Act)

PHIA (Personal Health Information Act)

Intro to Policies

Acceptable Use Policy

Protection of Personal Information Accessed Outside of Canada

Privacy Policy *(new)*

Privacy and Access to Information - Home

Records Management Policy

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

Email IT

Email is one of the weakest links in IT security.

Understanding some basic IT behind emails will help understand the risk.

Email IT

What account are you using or sending to?

Think ‘Dal.ca BUBBLE’

Inside the Dal.ca domain emails are encrypted.

* But *

When they leave the Dal.ca domain they are NOT.

Email IT

Dal vs Personnel VPN

VPNs = Virtual Private Network

Why should you use a VPN?

- The main purpose of a VPN is to hide your online activity. VPNs are often used to guard against hackers and snoops on public networks, but they're also useful for hiding your IP address, browsing activity, and personal data on any Wi-Fi network — even at home’ - https://www.avast.com/c-do-i-need-a-vpn

Dal’s VPN allows you to safely access what is behind the Dal Firewall.

Creation

Consider:

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

Creation

Think Purpose & Intent

“If your house is on fire, you’re not going to email the fire department.”

Beat Buhlmann, General Manager for EMEA at Evernote

Creation

Who = Recipients

- Reply all?
- The right individuals?
- Would a phone or MS Teams call be better? Can a document be shared another way?

Right person, Right information and in the Right way

Creation

Who = Students or Dal Employees

Email Protocol

Section (C.1.)

"Email is an authorized means of communication for **academic** and **administrative** purposes within Dalhousie. The University will assign all students an official email address. This address will remain in effect while the student remains a student and for one academic term following a student's last registration. This is the only email address that will be used for communication with students regarding all academic and administrative matters. Any redirection of email will be at the student's own risk. Each student is expected to check her or his official email address frequently in order to stay current with Dalhousie communications."

Creation

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 or MS Teams call better?

Creation

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.

FOIPOP Act

Creation

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

Creation

What = Content

Privacy Considerations:

Do:

- Think of audience
- Check recipients prior to sending
- Use secure links

Don't:

- Add sensitive personal information
- Send to non-Dal addresses
- Include too much personal information in the subject line (ex. not name AND banner #)
- Use auto-forward features

Creation

What = Content

Email Protocol & Personal Use

Section (C)

"Authorized Users should never consider their use of the Dalhousie University provided email system to be completely private. To the extent that Authorized Users wish their personal activities to remain completely private, they must not use the University's Electronic Resources for such activities."

Creation

What = Content

Attachments vs Controlled Links

- Best practice is to use controlled links
- Control the ‘who’ and access rights (i.e. read only, downloads etc.)
- Prevents forwarding of emails and attachments to wrong individuals
- Remove access when no longer required
- Links expire after 30days of inactivity

Management

What Types?

- Individual

vs

- Shared Mailbox

vs

- Project

What’s the difference?

Account Holder is....

Student

Employee

Alumni

Can = The same email inbox

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
- Set up properties to manage what happens to email automatically
- Deletion vs Permanent Deletion vs Purge
  - Set up trash folder to routinely delete emails
  - Remember the sent folder
- Downloads on what devices?

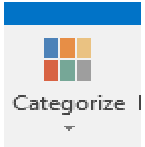
Management

Shared Account

Document the use of:

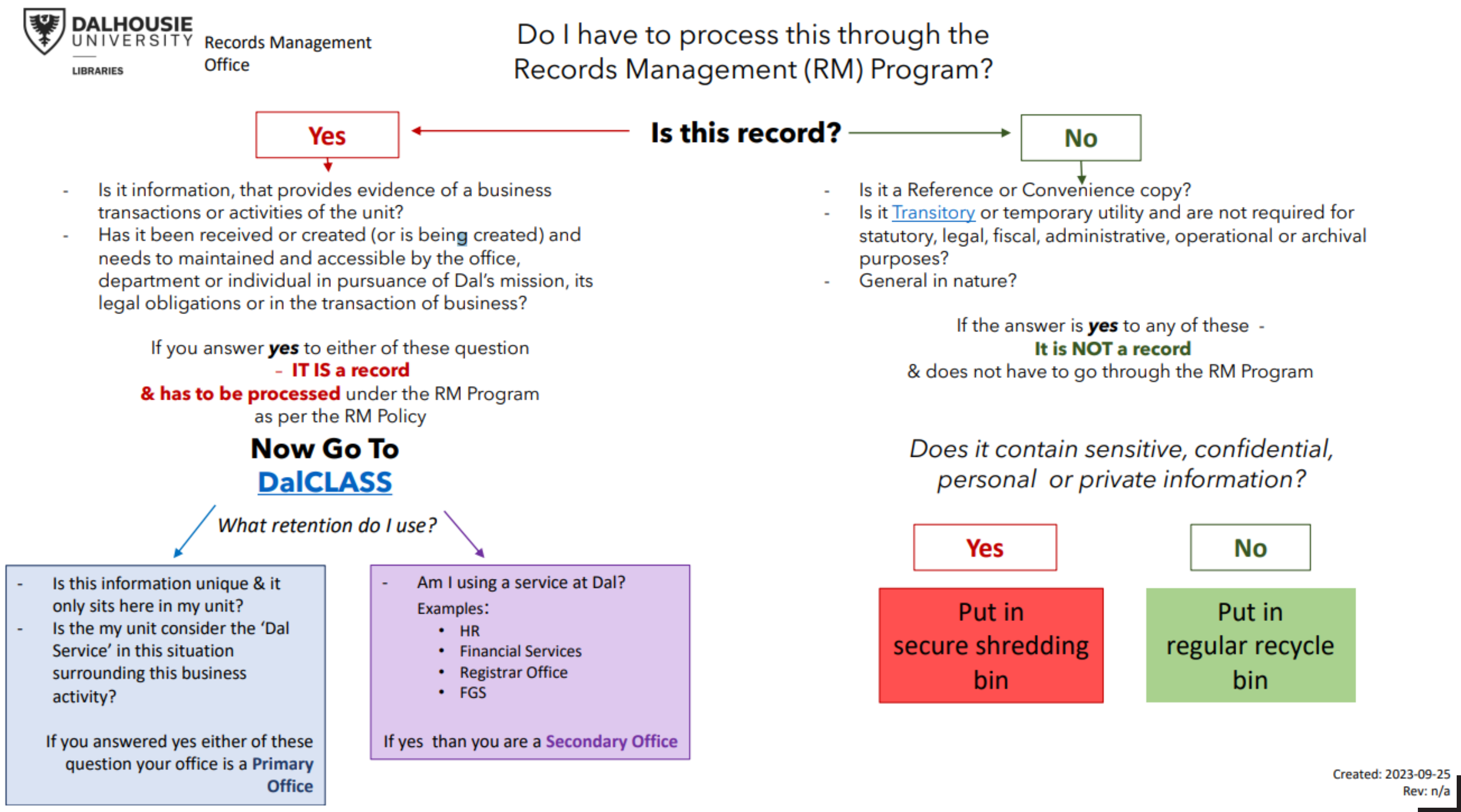
- Who has what rights and why
- Schedule of - user access review & who is accessing when
- Do the users have the emails forward to their accounts?

  (creates unnecessary duplication)

- Categorize feature 

- Folder structure – ex. have a template folder
- Naming convention – subject lines, folders
- Set up properties to manage what happens to email automatically

Dal Resources - Is it a record or not



DALHOUSIE UNIVERSITY
LIBRARIES

Records Management Office

Do I have to process this through the Records Management (RM) Program?

Is this record?

Yes

- Is it information, that provides evidence of a business transactions or activities of the unit?
- Has it been received or created (or is being created) and needs to maintained and accessible by the office, department or individual in pursuance of Dal's mission, its legal obligations or in the transaction of business?

If you answer ***yes*** to either of these question
- **IT IS a record**
& has to be processed under the RM Program
as per the RM Policy

Now Go To
DalCLASS

What retention do I use?

- Is this information unique & it only sits here in my unit?
- Is the my unit consider the 'Dal Service' in this situation surrounding this business activity?

If you answered yes either of these question your office is a **Primary Office**

- Am I using a service at Dal?

Examples:
- HR
- Financial Services
- Registrar Office
- FGS

If yes than you are a **Secondary Office**

No

- Is it a Reference or Convenience copy?
- Is it Transitory or temporary utility and are not required for statutory, legal, fiscal, administrative, operational or archival purposes?
- General in nature?

If the answer is ***yes*** to any of these -
It is NOT a record
& does not have to go through the RM Program

Does it contain sensitive, confidential, personal or private information?

Yes

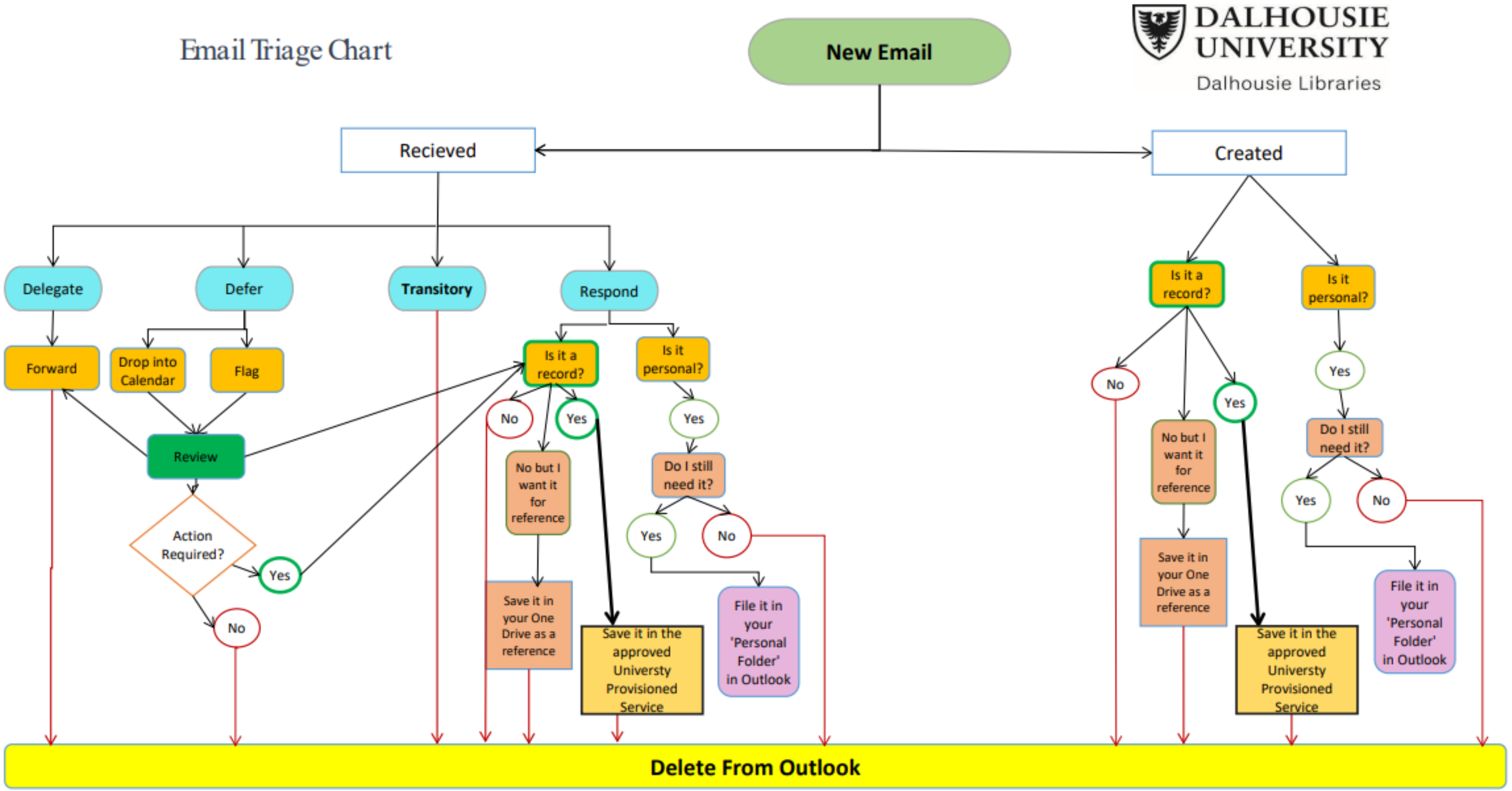
Put in secure shredding bin

No

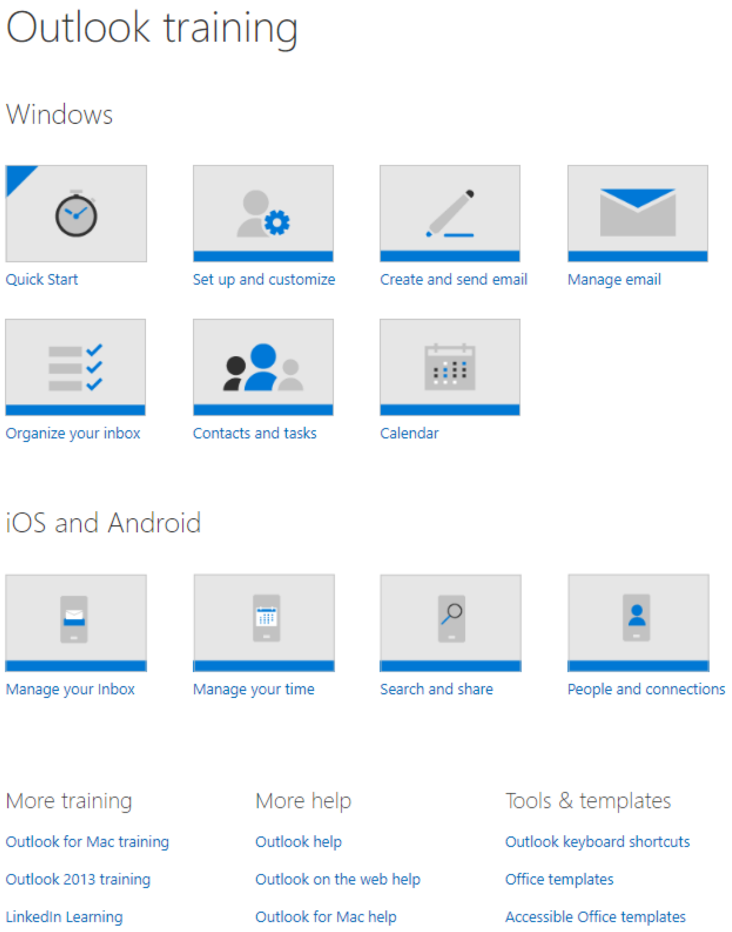
Put in regular recycle bin

Created: 2023-09-25
Rev: n/a

Dal Resources - Email Triage Chart


Email Triage Chart
DALHOUSIE UNIVERSITY
Dalhousie Libraries
New Email
Recieved
Created
Delegate
Defer
Transitory
Respond
Forward
Drop into Calendar
Flag
Review
Action Required?
Yes
No
Is it a record?
No
Yes
No but I want it for reference
Save it in your One Drive as a reference
Save it in the approved University Provisioned Service
Is it personal?
Yes
Do I still need it?
Yes
No
File it in your 'Personal Folder' in Outlook
Is it a record?
No
No but I want it for reference
Yes
Save it in your One Drive as a reference
Save it in the approved University Provisioned Service
Is it personal?
Yes
Do I still need it?
Yes
No
File it in your 'Personal Folder' in Outlook
Delete From Outlook

MS Outlook Features & Training



Outlook training

Windows

- Quick Start
- Set up and customize
- Create and send email
- Manage email
- Organize your inbox
- Contacts and tasks
- Calendar

iOS and Android

- Manage your Inbox
- Manage your time
- Search and share
- People and connections

More training	More help	Tools & templates
Outlook for Mac training	Outlook help	Outlook keyboard shortcuts
Outlook 2013 training	Outlook on the web help	Office templates
LinkedIn Learning	Outlook for Mac help	Accessible Office templates

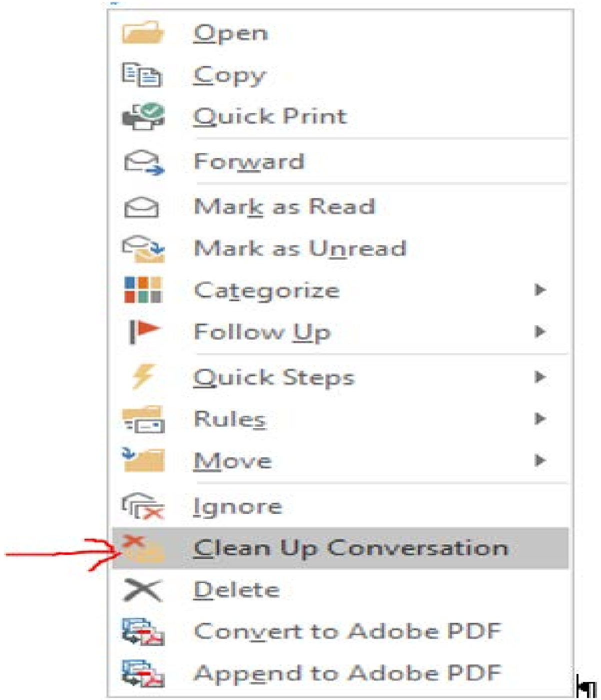
https://support.microsoft.com/en-us/office/outlook-training-8a5b816d-9052-4190-a5eb-494512343cca

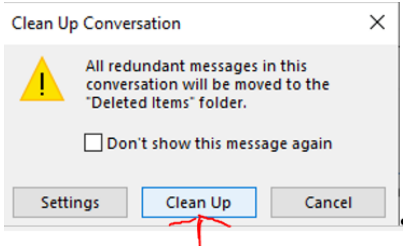
Outlook Features

Clean up Conversations

Select:

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


Open
Copy
Quick Print
Forward
Mark as Read
Mark as Unread
Categorize
Follow Up
Quick Steps
Rules
Move
Ignore
Clean Up Conversation
Delete
Convert to Adobe PDF
Append to Adobe PDF


Clean Up Conversation

All redundant messages in this conversation will be moved to the "Deleted Items" folder.

☐ Don't show this message again

Settings
Clean Up
Cancel

Outlook Features

Sharing folders

You can:

- share,
- ‘unshare’

or

- remove yourself from a shared folder

Think:

- Access rights

&

- Intent

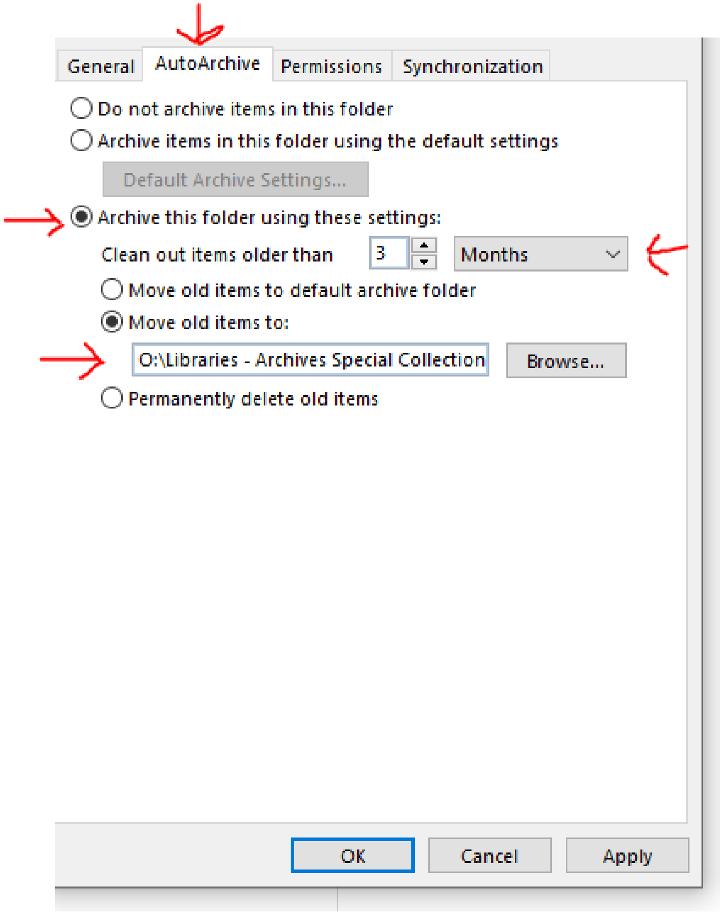
See: Microsoft Share and access another person's mailbox or folder in Outlook for more details

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


General
AutoArchive
Permissions
Synchronization
Default Archive Settings...
Browse...
OK
Cancel
Apply

○ Do not archive items in this folder
○ Archive items in this folder using the default settings
● Archive this folder using these settings:
Clean out items older than 3 Months
○ Move old items to default archive folder
● Move old items to: O:\Libraries - Archives Special Collection
○ Permanently delete old items

Outlook Features

Breach Prevention

- Delayed Send function
- File
- Manage Rules & Alerts
- New Rule
- Start from a Blank Rule
- Apply rule on messages I send
- Select Condition (specified account)
- Edit the rule description (select account)
- Defer delivery by X minutes

Outlook Features

Breach Response

Recall function

- [Recall an email message that you sent in Outlook - Microsoft Support]

Limitations

- Dal.ca only
- Does not work with listserv

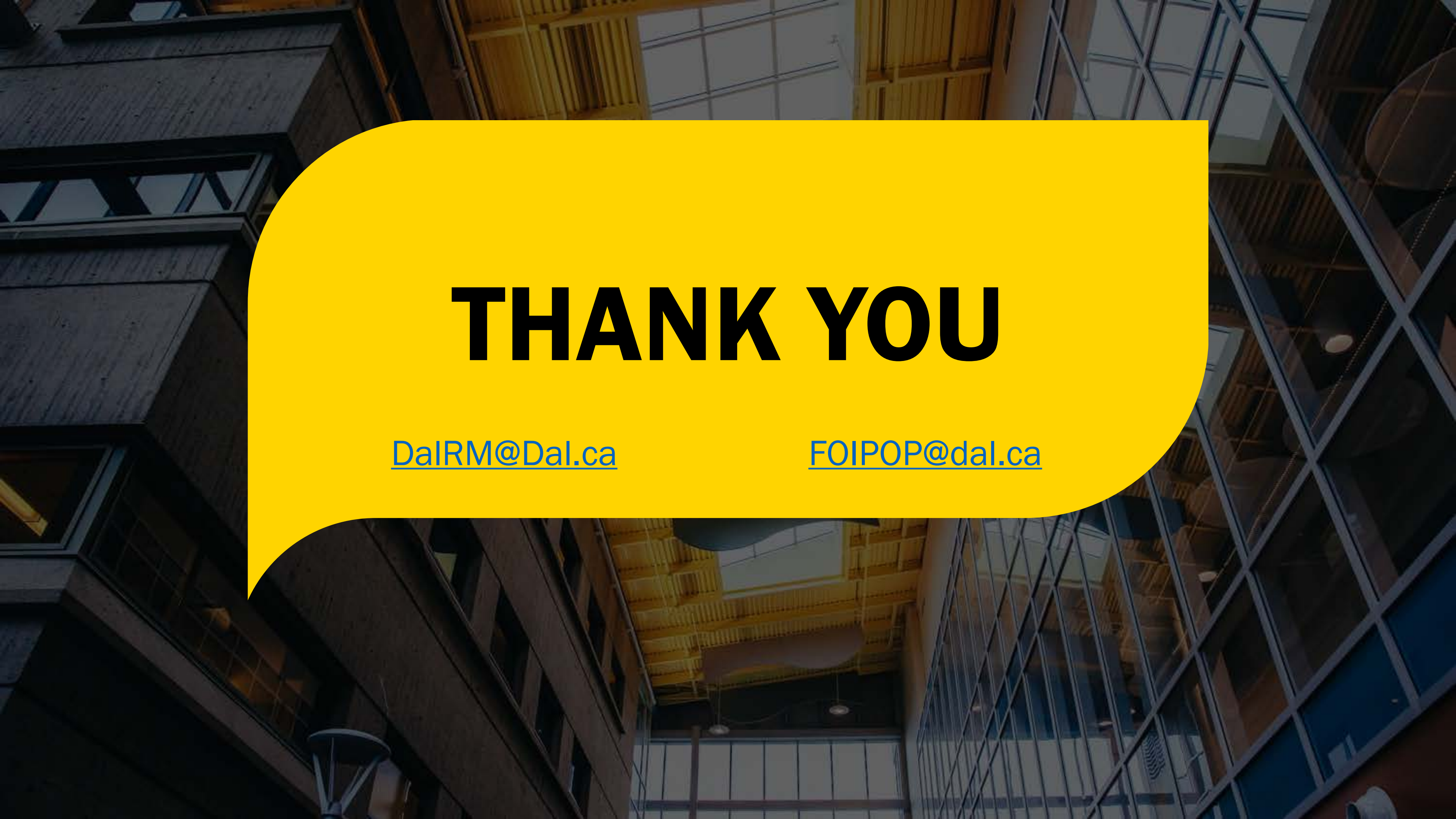
For more details about listervs see ITS SharePoint site: **Email Distribution Lists**

Dal RMO& Privacy Training

- Departure of Employees
- Digitization Things to think about
- Email Best Practices and Affiliate Partners
- How long do I keep this stuff? DalCLASS can help with that!
- Naming Conventions
- Privacy & Access Training
- Sending Records to their Final Destination
- Sending Syllabi to their Final Destination
- Shared Drive Clean-up - Where do I start?

Slides and resources available on the Records Management Office website under ‘Resources > Training’

Feedback



THANK YOU

DalRM@Dal.ca

FOIPOP@dal.ca