Records Management Program
Email Best Practices
Overview

- Intro
- Creation
- Management
- Shared Accounts
- Triage Chart
If so, keep the content professional & double-check the intended recipients.
Intro - Acts & Policies

• FOIPOP (Freedom of Information and Protection of Privacy Act)
• Records Management Policy
• Acceptable Use Policy
• Protection of Personal Information Policy
• Passwords Policy
• Guest Account Policy
• Official Student Email Policy
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
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’ licence);
• fingerprints, blood type, or inheritable characteristics;
• medical or personal history; g. educational, employment, financial, or criminal history;
• personal views or opinions.
Where – Inside vs Outside

- Inside the Dal.ca domain emails are encrypted.
- *But*
- When the leave the Dal.ca domain they are NOT.
Why = Function

- Is this an administrative business function of Dal?
  - 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

Student – Employee - Alumni
Can = Same email account

• Email Capture – part of work flow
  • Who needs access to the email & when
• Personal Folder
• Leaving Dal or moving within Dal
  • What do you do with the emails?
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
Other resources

• Skillsoft basic email tutorial
  https://dal.skillport.com

• Microsoft online tutorials
  ‘Office 365 training center’
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