Records Management Program
Email Best Practices
Overview

- Intro
- Creation
- Management of Accounts
- Triage Chart
- Resources
Intro - Video

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

Found on Records Management Website under Resources- Email Content Management Best Practices
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 con. - Policies

• Records Management Policy
• Acceptable Use Policy
• Policy for the Protection of Personal Information Accessed Outside of Canada
Intro con. – 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 con.

**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; e.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 they 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

• Percipio email tutorial
  • www.dal.percipio.com
  • Search terms:
    ‘Outlook’
    ‘Outlook 365’ *(online version)*
    ‘Outlook 2016’ *(desktop version)*

• Microsoft online tutorials
  Google: ‘Office 365 training center’
## Other resources con. - Percipio

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### Outlook
- **Outlook**
  - Microsoft Outlook is Office's email client and productivity app. Explore Outlook, its uses and configuration.

### Practice Lab
- **LAB: Outlook 2016 (77-731)**
  - Outlook 2016 (Windows)
  - 2h 20m 0s | Beginner
  - Oct 2019 | From Channel: Microsoft Office Specialist on Microsoft Office 2016 Outlook

### Book
- **Outlook 2019 for Dummies**
  - Get up to speed with the world's best email application — Outlook 2019. Of the millions of people who use Outlook, most only use about two percent of its features. Don't stay in the dark! Outlook 2019 For Dummies...
  - 4h 40m 0s | Everyone | by Faithi Wempen, Bill Dryzel | Sep 2018 | From Channel: Outlook

### Video
- **Using Outlook**
  - Outlook 2019 (Windows)
  - The Outlook interface is designed to make access to a wide variety of tools as easy and manageable as possible. Using the Office ribbon, you will be able to browse between the different toolsets, while the vie...
  - 3m 37s | Beginner | Dec 2018 | From Course: Setting Up

- **Using Outlook**
  - Outlook 365 (Windows)
  - The Outlook interface is designed to make access to a wide variety of tools as easy and manageable as possible. Using the Office ribbon, you will be able to browse between the different toolsets, while the vie...
  - 4m 45s | Beginner | Dec 2018 | From Course: Setting Up

- **Using Outlook**
  - Outlook 2016 (Mac)
  - The Outlook 2016 for Mac interface is designed to make access to a wide variety of tools as easy and manageable as possible. Using the Office ribbon, you will be able to browse between the different toolsets...
  - 4m 45s | Beginner | Dec 2018 | From Course: Setting Up
Other resources con. - Percipio
Other resources con. - Percipio
Other Resources con. - Microsoft

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
- Outlook for Mac training
- Outlook 2013 training
- LinkedIn Learning

More help
- Outlook help
- Outlook on the web help
- Outlook for Mac help

Tools & templates
- Outlook keyboard shortcuts
- Office templates
- Accessible Office templates