



# Email Best Practices

Dalhousie Administrative Records  
Related to Dalhousie's &  
Affiliated Partners Integrated Work

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

*We acknowledge the histories, contributions, and legacies  
of the African Nova Scotian people and communities who  
have been here for over 400 years.*

# Video

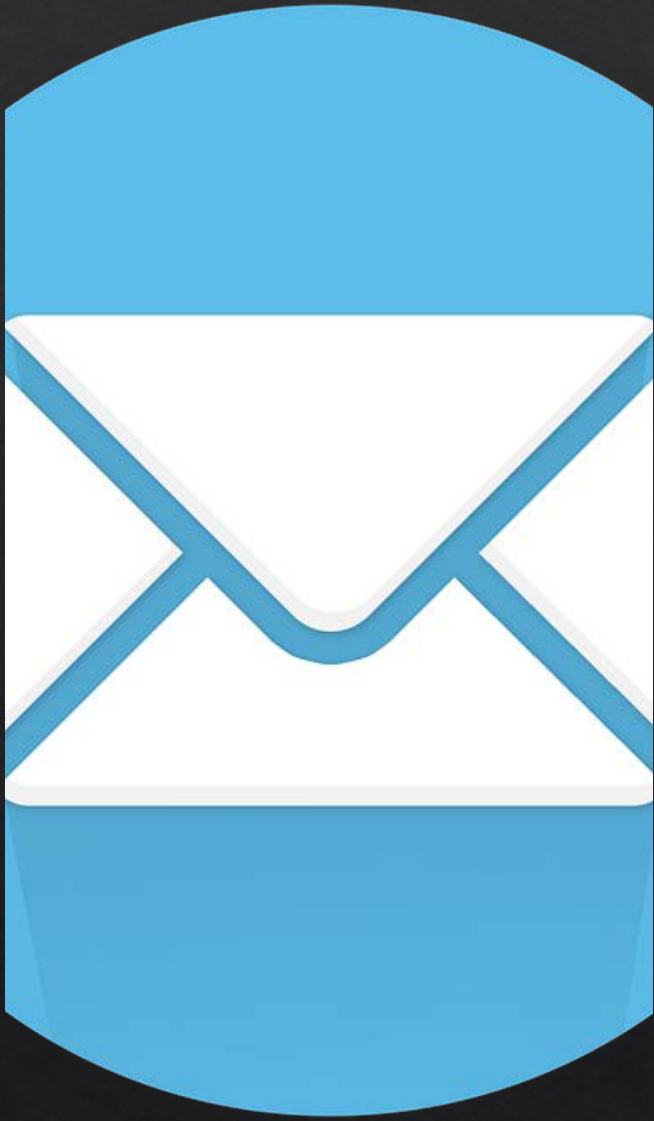
If so, keep the  
content professional  
& double-check the  
intended recipients.



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)

PHIA (Personal Health Information Act)

PIPEDA (Personal Information Protection and Electronic Document Act)

& Others (*depending on jurisdiction of affiliated partner*)



# Intro – Acts *con.*

## PHIA vs FOIPOP

PHIA = Affiliated Partner vs FOIPOP = Dal

- What would happen if either systems were breached?
- Different requirements for health custodians
- PHIA: systems are outlined, has stronger safe guards & clearer guidelines
- Student involvement related to grading /evaluation of student - Dal owner
- The nature of any student related email is Dal business **not** Affiliated partner business

# Intro – Policies

*(Dal)*

Records Management Policy

Acceptable Use Policy

Policy for the Protection of Personal  
Information Accessed Outside of Canada

# Intro – Protocols & More (*Dal*)

## Email Protocol

Official email use message *(found on ITS SharePoint site)*

Go to ITS site:

IT Policies, 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
- Dal vs Affiliated Partner



# Creation - example

## Dal

vs

## Affiliated Partner

- ◇ Account information
- ◇ Student grades & evaluations
- ◇ Correspondence with a student
- ◇ Correspondence about a student
- ◇ Encryption Tunnel & at Rest
- ◇ Smaller and easier to secure
- ◇ Dal Has Multi Factor ID protocols

- ◇ Patient care information
- ◇ Correspondence about clinic administration
- ◇ Different sites are harder to maintain high level of security

# 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 topic related → topic related



# What = Content

## Personal Information Defined (FOIPOP)

- 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.

# Management Account Used

## Dal Outlook Client

- ◆ Desk top application & Computers
  - ◆ Encrypted during transit
  - ◆ **MAY NOT** be encrypted at rest
  - ◆ Device encryption at rest – Talk to Dal ITS about
- ◆ MyDal > Outlook on-line
  - ◆ Fine

## Other Email Carrier

- ◆ Ask their IT Dept.



# Why = Function

- Is this an administrative business function of Dal or the Affiliated Partner?

Check - [DalCLASS](#)

- Can a Dal.ca email be used 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

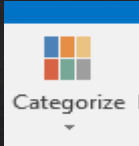
Can = Same email  
account

- 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?

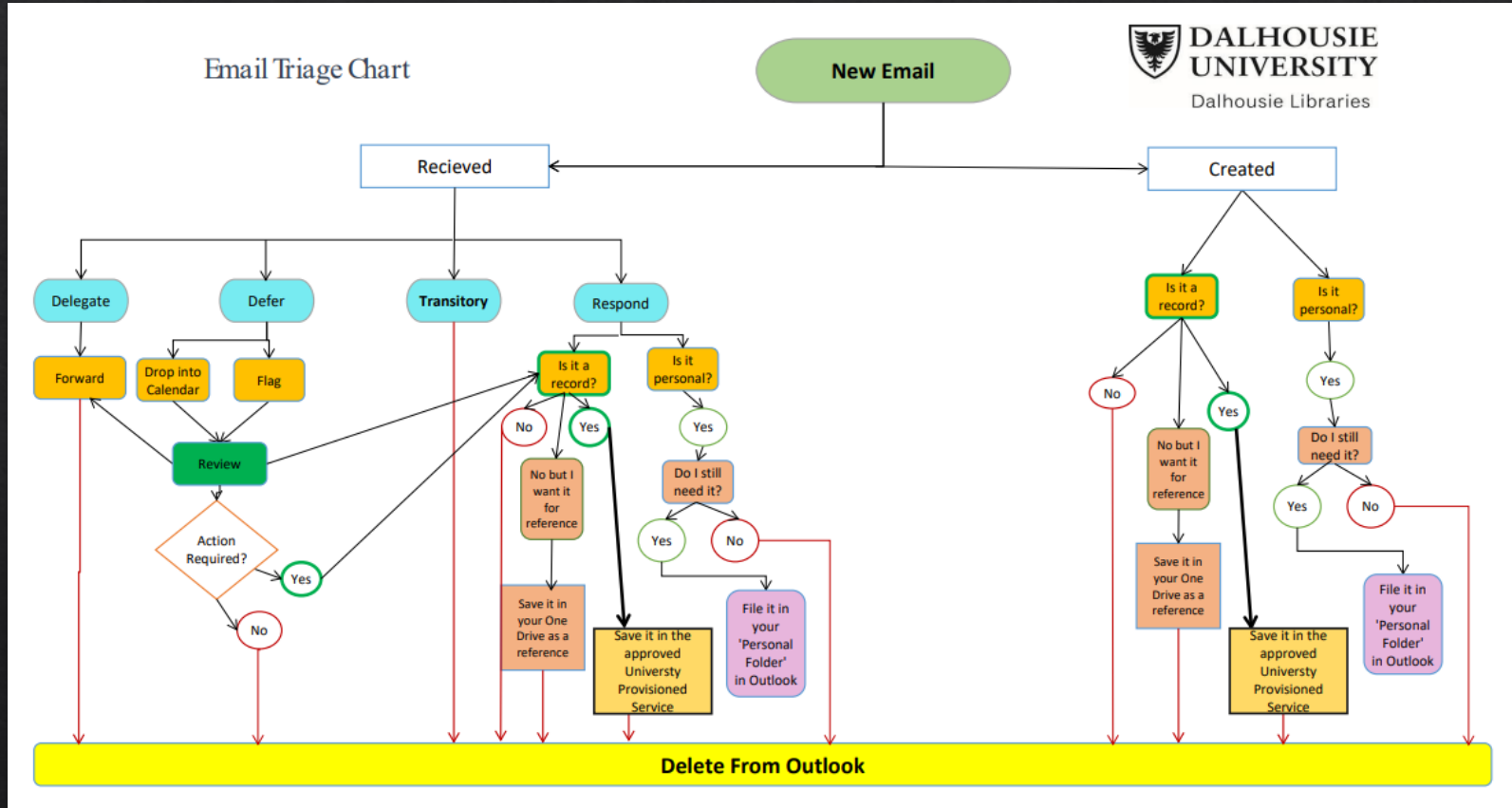
# Management – Shared Accounts

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

# Email Triage Chart



# Outlook Features

## Outlook training

### Windows



Quick Start



Set up and customize



Create and send email



Manage email



Organize your inbox



Contacts and tasks

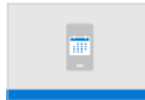


Calendar

### iOS and Android



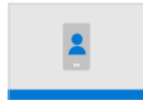
Manage your Inbox



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](#)

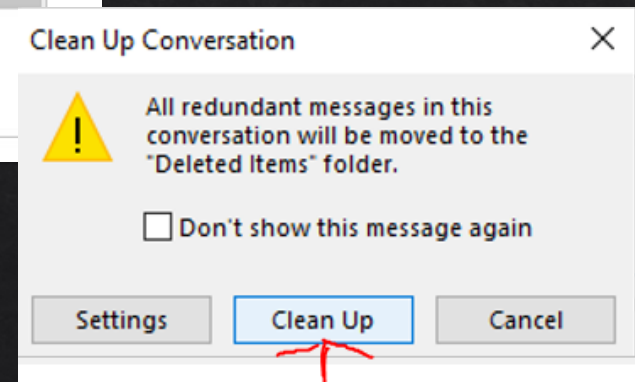
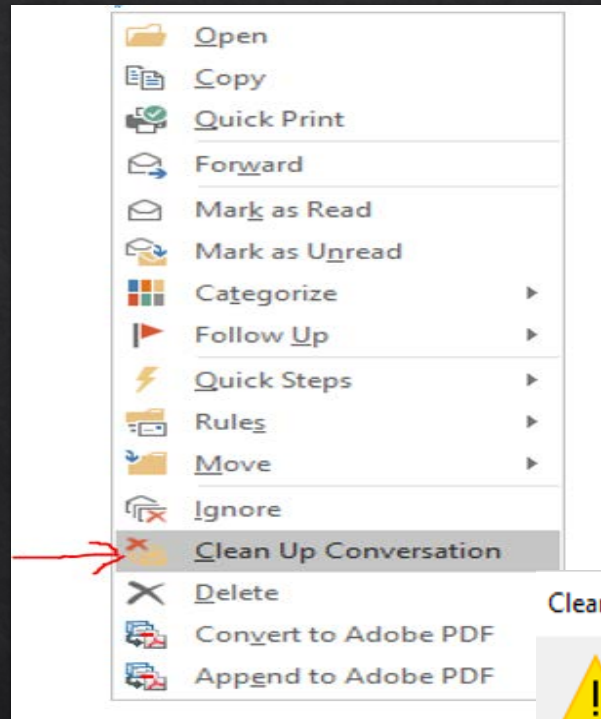
Microsoft 365 Training  
Centre



# Outlook Features – Cleanup Conversations

Select:

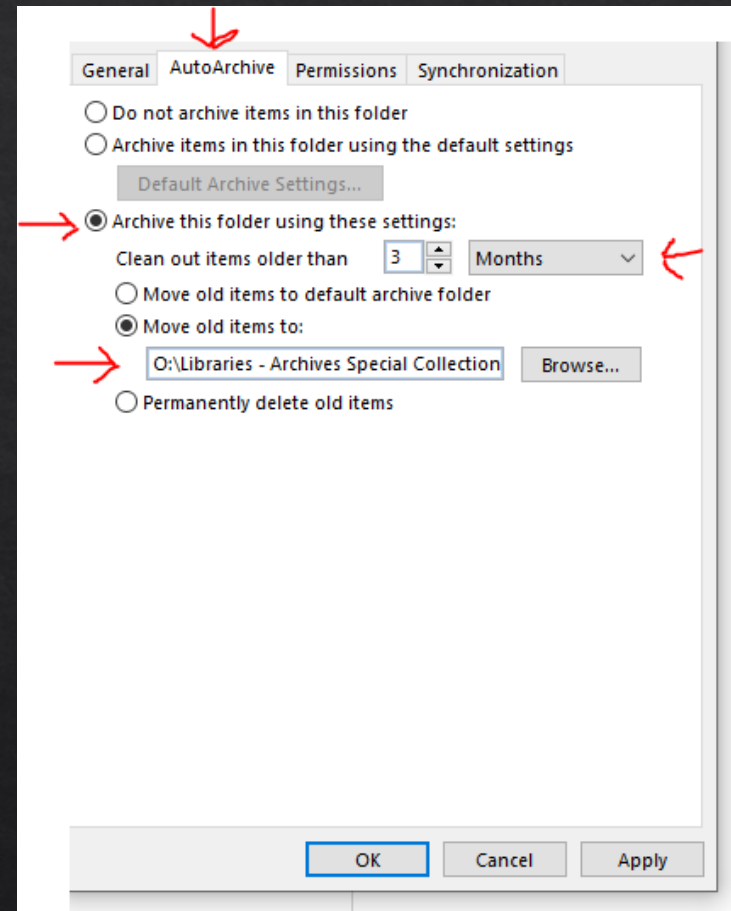
- The email conversation that you'd like to clean up.
- Right click
- Choose > **Clean Up Conversation.**
- Select **Clean Up.**



# 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 tutorials

Search terms:

- 'Outlook'
- 'Outlook 365' (*online version*)
- 'Outlook 2016' (*desktop version*)

- Dalhousie + Microsoft 365 User Resource Centre





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