

An aerial photograph of the Dalhousie University campus. The image shows various academic buildings, a large green soccer field with white markings, and a prominent building with a central tower and dome. A large yellow rounded rectangle is overlaid on the left side of the image, containing the title text. The overall scene is captured from a high angle, showing the layout of the university grounds and surrounding greenery.

Email Best Practices

With the Records Management Office, Information Security Office & Privacy Office





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

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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](#)
- [Information Security Policy](#)
- [Privacy Policy](#)
- [Protection of Personal Information Accessed Outside of Canada](#)
- [Records Management Policy](#)



Intro

**Protocols &
More**

[Email Protocol](#)

[Official email use message](#) found on
ITS SharePoint site

Go to ITS site:

[IT Policies, 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

**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.



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.



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
- Include personal information in the subject line
- 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





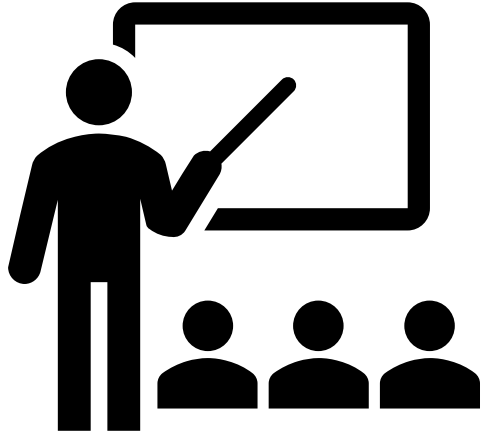
Management

What Types?

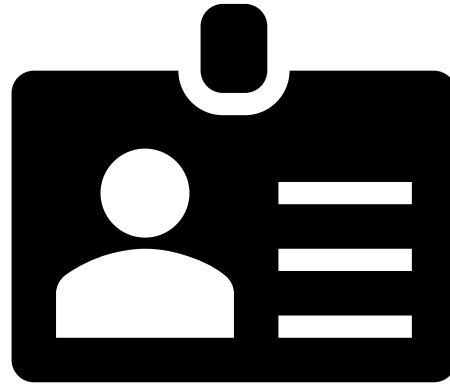
- Individual
vs
- Shared Mailbox
vs
- Project

What's the difference?

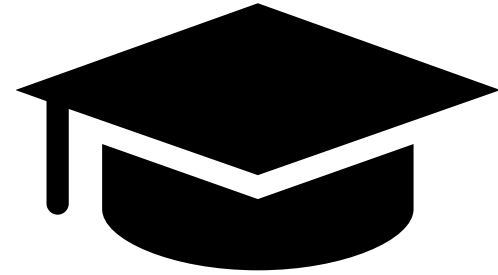
**Account
Holder
is....**



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?



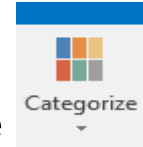
Management

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?

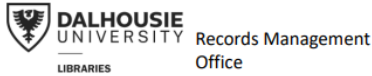
(creates unnecessary duplication)



- 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



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



- 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 be 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 questions
 - **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 questions your office is a **Primary Office**

- Am I using a service at Dal?
 Examples:
 • HR
 • Financial Services
 • Registrar Office
 • FGS

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

- 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

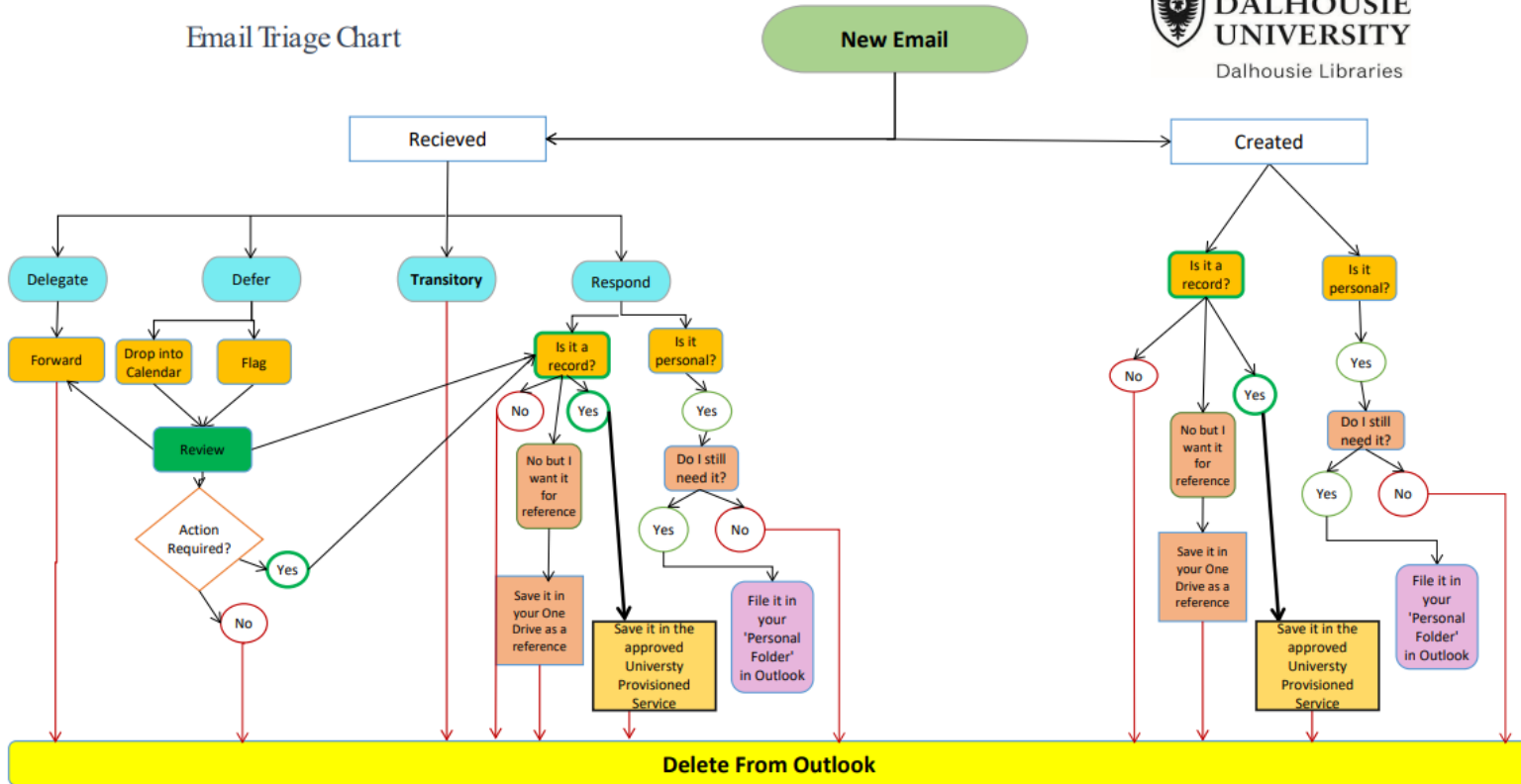
Put in
 secure shredding
 bin

No

Put in
 regular recycle
 bin

Dal Resources - Email Triage Chart

Email Triage Chart





MS Outlook Features & Training





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

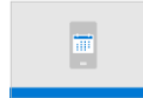


Calendar

iOS and Android



Manage your Inbox



Manage your time



Search and share



People and connections

More training

[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](#)



Steps to do general cleanup

Step 1. Check for 'hot topics' and terms of issues that you may need to review in more details. Put those in folder and then put those in a folder for later.

Step 2. Change the view to sort email by Date oldest to newest and start deleting them stop at the date you decided to hold into . We spoke of stopping at Jan 1, 2024



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

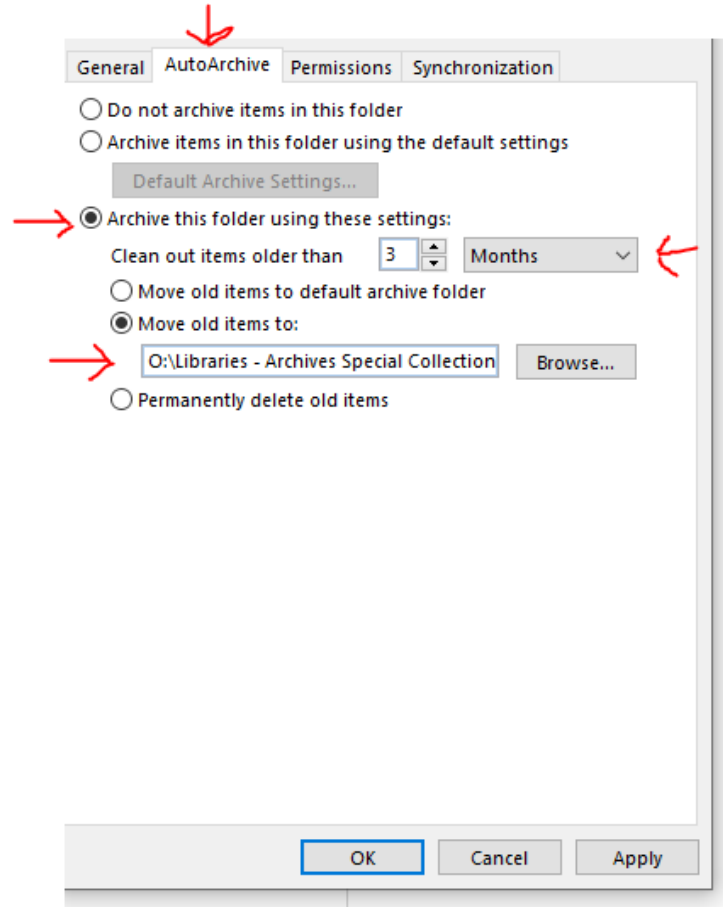


Outlook Features

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



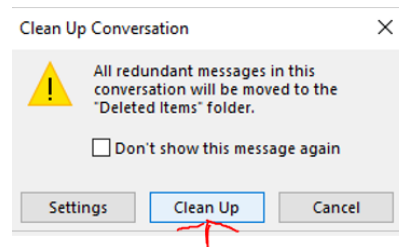
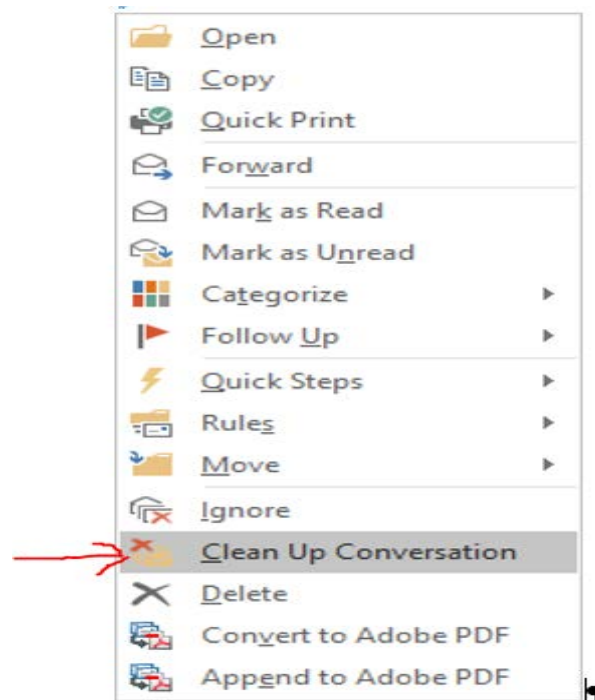


Outlook Features

Clean up Conversations

Select:

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





Outlook Features

Breach Prevention

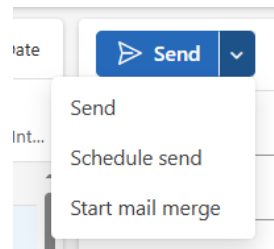
- [Delayed Send function vs Schedule Send](#)
- File
- Manage Rules & Alerts
- New Rule
- Start from a Blank Rule
- Apply rule on messages I send
- Select Condition (specified account)
- Edit the rule description (select account)
- Defer delivery by X minutes



Outlook Features

Breach Prevention

- [Delayed Send function](#)
 - All emails
 - Go to: Settings > Mail > Compose and Reply > Undo Send section > Select time frame (you can choose up to 10 Secs) > Save
- [Schedule Send](#) (or Delay Delivery)
 - Per email
 - Traditional go to: Options – Delay Send
 - New version Go to: Send button and Schedule Send





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](#)



Outlook Features

Calendar

Sharing & Permissions

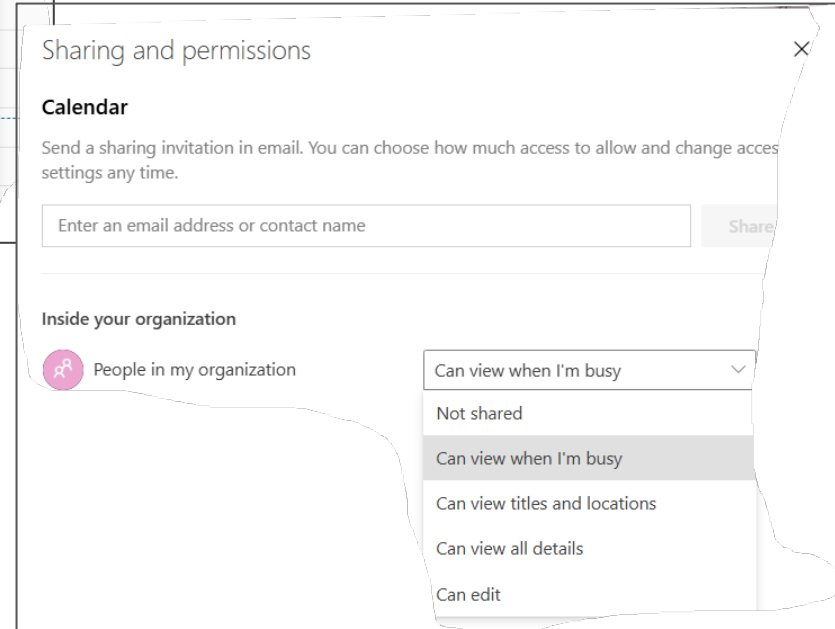
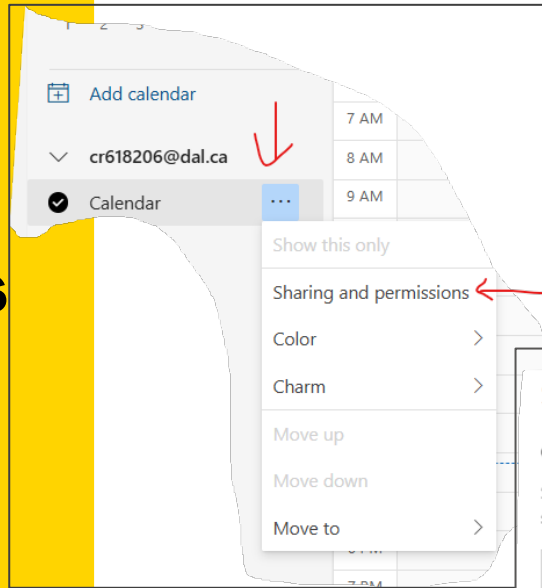
Looks different in different versions

- [Different platforms of M365](#)
- [Outlook on the Web](#)



Outlook Features

Calendar





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'



THANK YOU

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