Wolfson College Email Management Policy

This policy applies to every member of College staff who sends or receives emails in the course of their work.

All work-related emails are College records. Some of them are of greater significance or use than others, and will be kept for longer, but almost all of them could be released in response to an information request. It is therefore important that all staff who use email manage it appropriately, ensuring that they keep or delete messages in line with our Records Retention Schedules. This guidance sets out:

1. How our role-based email addresses function
2. How you should manage your work email
3. Security considerations of which you should be aware
4. College style guidelines in respect of email
5. Tools and tips to help you work more efficiently with email

1. Role-based email addresses

You will be given a role-based email account for work purposes (e.g. bursar@wolfson.cam.ac.uk). This account will have been used by your predecessor, and will be passed on to your successor. You should manage your work emails with this in mind.

You may also request a personal email account if you need one. This will be based on your crsid (e.g. abc123@cam.ac.uk), which you can use for personal messages. Do not use this account for any work related emails.

2. Managing your email

Email is used to transmit a wide variety of information, with varying levels of importance. Some messages are inconsequential, and can be deleted immediately; others will record significant decisions of long-term importance, document key processes, need to be kept for legal reasons, and/or be of historical interest. When deciding what to keep and for how long, you should refer to the Record Retention Schedule for your department, and seek guidance from the Archivist & Records Manager as necessary.

As we have role-based email addresses, important emails can be filed within your mailbox; there is no need at present to save digital copies elsewhere. Where emails need to be associated with other information in a paper file in order to share information with all those who need it, they should be printed and filed.

When setting up the file structure within your account, you might choose to mirror the filing structure on your departmental shared drive. You should also consider the ease with which you will

be able to delete messages that are no longer required, *e.g.* grouping routine enquiries in folders by year, so that an entire folder can be deleted in one go once they are no longer required.

3. Security

Be aware that:

1. Sensitive information should not be sent by email. Such as passwords and personal records.
2. You should not use a non-University/non-College account for work business.
3. You should not share your password with anyone else.
4. Do not change your role based email password without consulting with the IT office.

Do not email sensitive material to yourself. If you need to work on such material at home then contact the IT office for secure remote access.

The IT Team can advise on alternative solutions to any issues you may encounter as a result of these restrictions.

4. College Style

All work-related emails should be clear and professional. Ensure that you:

1. Include a signature that states your full name, role, phone number.
2. You may compose email in simple text. If you wish to use fonts and style then follow the College specified style guide.
3. Set your email to include previous messages in your reply, and to put your response at the top of the text. This provides context and ensures that the email string forms a complete record of your discussion. Do not annotate or insert text in earlier messages as this is confusing.
4. Consider using 'out of office' auto reply when you are away, or to alert people to your working pattern. This could however attract more spam emails.

5. Tools and Tips

1. Consider whether an email is necessary. Would a phone call or conversation be more efficient, or less likely to give rise to a misunderstanding? Or do you need to create a record of the discussion?
2. Try to keep each message to a single subject and give it a clear title. This will make it easier to manage.
3. Use distribution lists or mail merge function to avoid long lists of recipients or to avoid sharing email addresses inappropriately.
4. Whenever you deal with an email, make an immediate decision on whether to keep it in the default folder or delete it, or file it elsewhere.

5. Delete emails that do not need to be kept immediately where possible, and make a habit of regularly deleting categories of message that are no longer required according to the Records Retention Schedule for your department.

6. Remember that to fully delete email, you need to empty your 'Deleted items' or 'Trash' folder. This folder counts towards the overall storage quota.

7. Do not forget sent mail folder either when filing or deleting emails. This the main record of your own activity.

8. If you are filing a large number of emails retrospectively, you may find it helpful to sort them by date, sender, subject or size in order to identify those which are no longer needed, of little/great importance, or just taking up a lot of space.

9. Attachments take a large amount of space in inbox and could cause many other issues such as versioning conflict and data corruption. For example, sending an attachment to 20 people means producing 20 copies of that document on the email server. Try to avoid attachments as much as possible. To share a document with colleagues at Wolfson try to put it in a shared folder and then just send the path/link by email.

10. You may also consider using the Wolfson Cloud server to share a large document with external contacts instead of email attachments. IT Office can advise you on cloud use.

11. Do not use any 'auto archive' function. Instead manage your email manually on regular basis.