



Email standards,
protocol and
guidance

July 2010

Email standards, protocol and guidance

A good guide to communications for staff

Introduction

The following guidance introduces good practice for writing and sending emails. It also introduces a University protocol for email signatures, disclaimers and use of mailing groups. It covers the following areas:

- Displaying your identity and contact details
- Email disclaimers
- Effective emails
- Copying emails to a group
- Writing style
- Attachment etiquette
- Email and accessibility
- Emailing students

The guidance offered is intended to help make your email communications professional, effective and easy to understand.

Displaying your identity and contact details

It is good email practice to make clear who the email is coming from and to include contact details in any signature so that people can get in contact with you or your section easily. This is true if you are sending an email from your own email account or emailing from the section or departmental email account.

Making your name appear as the sender to recipients

When you send an email, it is far better for the person(s) receiving the email to see your name rather than your user name in their in-box. This means the recipient knows that the message is from 'Fred Bloggs', rather than mystery person 'fb501'.

Instructions on how to make your name visible as the sender of an email (in Outlook and Webmail) are online at: www.york.ac.uk/itservices Go onto the Knowledge Base link in

Popular Pages and enter 'display name' in the search field. When the changes are made to the University email system to allow names as part of the address, this process will no longer be necessary.

If you use other mail programs, contact your Departmental Computing Officer for advice.

Add your signature to the end of an email

Providing details in your signature is important to the recipient, so that they know who you are, your job title, office hours and place of work etc. and have an easy reference to all your contact details.

If you have created an office or departmental email account, then you need to add the general office contact details in the signature.

Example personal email signature:

Emma White
Departmental Administrator, Department of Biology
Room B12, University of York, Heslington, York, YO10 5DD
Tel: +44 (0)1904 434000 Fax: +44 (0)1904 434001
Email: ew123@york.ac.uk

Please note I work Monday, Wednesday and Friday

EMAIL DISCLAIMER <http://www.york.ac.uk/docs/disclaimer/email.htm>

Instructions on how to add your signature automatically to the foot of every email you send (in Outlook and Webmail) are online at: www.york.ac.uk/itservices Go onto the Knowledge Base link in the popular pages and enter 'signature' in the search field.

If you use other mail programs, contact your Departmental Computing Officer for advice.

Email disclaimers

The University, the sender, or both can be made liable for the content of an email. A disclaimer has been made available and should be used to protect the University and those sending emails on its behalf.

University of York email disclaimer:

This email and its attachments may be confidential and are intended solely for the use of the intended recipient. If you are not the intended recipient of this email and its attachments, you must take no action based upon them, nor must you copy them to anyone. Please contact the sender if you believe you have received this email in error.

Any views or opinions expressed are solely for those of the author and do not necessarily represent those of the University of York.

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Why use a disclaimer

The University, like many organisations, uses an email disclaimer to help fend off potential claims and to inform recipients of the University's position in relation to the information being emailed. It is mandatory for all University of York email users to add a reference to the stated legal disclaimer at the bottom of their email signature.

Adding the disclaimer to your email signature

To avoid lengthening the signature at the bottom of the email, and to ensure the most current legal disclaimer statement is used, you should add the following web address as a link to the bottom of your email signature <http://www.york.ac.uk/docs/disclaimer/email.htm>

Instructions for adding email signatures to Outlook or Webmail can be found in the section above. If you use other mail programs, contact your Departmental Computing Officer for advice.

Effective emails

People are more likely to read and respond to your emails if you make an effort to be clear about the subject of your email, clarify the intended recipient(s), state any call-to-action and summarise any other need-to-know information early in the email.

Clear subject titles

Always put a clear title in the subject box when composing an email. Make the words of a headline meaningful to the recipient to set the scene for the content and to help both you and them to file the email appropriately.

If an email conversation develops into a discussion about other areas as well as the original topic, consider changing the subject heading when you reply. This makes it easier to

recognise the purpose of the email at a later date, without having to open it, and keeps the subject heading relevant.

If you want to respond to a specific point in someone else's mail, choose 'Reply' and delete everything except the relevant part of their mail. Then type your comments above the original email to make it clear what you wish to say in response.

Clear call-to-action

Make it clear if and what action is needed, by whom and set deadlines. If necessary set the actions out as separate items with a named person next to each.

Provide some context. If you are contacting someone for the first time, or they have no background with the topic, a brief introductory sentence will help. In a reminder email, refer back to previous correspondence, with dates.

In a long email exchange, it can be helpful to delete all but the most recent message when you reply, provided the context is not needed.

Ensure the mail you send is relevant to your readers: don't copy others into replies unnecessarily. It simply fills up peoples' inboxes.

Copying emails to a group

In addition to the advice on 'effective emails' given in the section above, taking time to use 'copy' facility correctly when emailing groups can help the effectiveness of your communications.

Small known list to copy in

When people need to know who the other recipients are, use the Cc 'carbon copy' field, which is visible to everyone. In some cases it is important that recipients can understand why they're receiving the mail and seeing the recipient list can help. This is generally good for when you are copying in a small number of people who are relevant to the email exchange.

Emailing a large group

If you are sending out an email to a large group, using the Cc field will create a long list and cause confusion to the recipient who may not understand why the email has come to them. This is where the Bcc field works better.

In the header of an email Bcc means 'blind carbon copy'. Recipients cannot see who else has received the message. Bcc is used when mail is sent to a group of people who don't necessarily know each other and don't need to know who else is receiving the mail, but

would find it helpful to understand the 'capacity' in which they are being contacted. For example Departmental Training Officers, Chairs of Boards of Studies, DoFM support staff.

When using Bcc, it is helpful in the main body of your email to state clearly who the recipients of the email are, the subject or topic, a clear call to action and any deadline you have set. Further recommendations can be found in the 'effective emails' section.

Example of how to head up an email when using Bcc to mail a large group(s):

To: All Heads of Department and Departmental Administrators

From: The Communications Team

Subject: Articles for the next University magazine

Action required: Submission of suggested articles from your department

Deadline: 21 February 2010

Dear all

Articles needed for next edition of the University Magazine

The next edition of the Etc.

Instructions on how to use Bcc (in Outlook and Webmail) are online at:

www.york.ac.uk/itservices Go onto the Knowledge Base link in the popular pages and enter 'Bcc' in the search field.

Writing style

Emails are considered to be less formal than other means of communication, although they have become more formal in work settings in recent years. There is no particular guidance on salutations or sign-offs, but politeness is always important.

There is no maximum recommended length for email. However, emails are often skim-read; your reader has a lot of mail competing for their attention. Make sure you get your point across quickly by keeping your email concise and easy to read.

It's harder to read from a screen than a printed page. Use plain English and break up text by using short paragraphs, headings and lists.

Avoid using all capital letters in both the subject box and the main body of text. It is considered to be 'SHOUTING' in email terms.

Numbered paragraphs are often helpful for clarity. However, numbered and bulleted lists may change format when read in other mail systems so bear this in mind when formatting your email.

If you have lengthy or detailed information to get across, an email may not be your best option. Think about other communications methods, or consider your attachment options (see attachment etiquette).

Avoid using emoticons or 'smileys' – they are too informal for work-related communication.

Attachment etiquette

Sometimes you may need to refer to, or circulate, documents that are relevant to your email. Attachments are useful way of sending small documents to small groups. Be aware of the size of any document or file you are attaching. Some email systems will only accept up to 20Mb in size.

Sending larger documents, or where the mail group is larger, try to avoid attaching the document itself. Instead:

- Put it on the web and link to it.
- Store the document on a shared drive (if all your recipients have access) and circulate the location.

If you do need to send attachments, bear in mind:

- Your recipient's inbox or mail account may not have much space
- Some mail programs don't allow users to remove the attachment from the mail and save it – they may only have the choice to delete it all or keep it all.
- Some companies' mail servers reject very large attachments without notifying the mail recipient.
- They increase the size of your sent box.

Attachments can be detached from the mail they came with using Outlook. Instructions for viewing and detaching attachments are online at: www.york.ac.uk/itservices Go onto the Knowledge Base link in the popular pages and enter 'attachments' in the search field.

Any documents that are attached (or linked to in HTML mail) need to be accessible, e.g. by using headings and styles in Word and pdf.

When sending HTML email, remember to set it up so that any images and attachments are held on the web server not included with the email itself.

Email and accessibility

Even when you know your intended recipients, you may be unaware of their accessibility needs. The recipient should have total control over how they read the message and be able to apply character size, font or colour settings of their own to make the message more readable for them.

If in doubt, use plain text

Using plain text with no formatting, colour or font selection is a safe option to allow recipients to manipulate the messages you send. The plain text format is also kindest to recipients who receive a lot of emails, as it takes up least space in their mail folders.

Some mail programs provide an option, which is sometimes the default setting, to send emails in HTML format, enabling you to specify the layout, font face and size and colour for your text. Ideally you should still choose to use plain text.

Using HTML for external promotional emails

HTML allows you more choice over the look and feel of your email. While this has advantages, HTML emails need to be set up correctly to avoid causing problems for users.

Creating good, accessible HTML emails which work with a range of mail readers takes time. If you need to use HTML email, either for marketing purposes or for users who need structured formatting, one option is to use one of the University's HTML email templates: they have been designed with accessibility in mind and tested thoroughly.

If you are thinking about HTML emails for marketing or promotion, please get in touch with the University Web Team first, they will be able to advise. Telephone the Web Office on 01904 434127 or email web-office@york.ac.uk

Emailing students

The Student Records Enquiry Screen (SES) allows emails to be sent to selected groups of students. SES is used for activities including; announcements about welfare matters and information in respect of academic work.

The SES is controlled by the Database Manager for Student records. Academic staff will have access to SES and use the system in line with the University's Regulations for Use of Computing Facilities.

Staff can email students from the Student Enquiry Screen. All academic and teaching staff are automatically given access and can login from: <https://evision.york.ac.uk>

Other staff can request access to the student enquiry screen from:
https://www.york.ac.uk/univ/mis/cfm/systemaccess/sysacc_start.cfm

And finally...

Please remember your legal obligations at all times. The University Computing Service Terms of use apply to all the emails we send. The UK laws on defamation, disabled access, releasing material under Freedom of Information and the University's policy on harassment are also relevant. Use of the email disclaimer does afford some degree of protection, but you may still be personally liable for any legal action.

Communications Office

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