

ORGANIZATIONAL POLICY

March 5, 2019 (v1.1)



HSCG EMAIL ACCOUNTS

The HSCG has numerous email addresses and forwarders that are used by staff, board members, committee members and volunteers. This policy covers the function, creation and use of HSCG email addresses.

ALL HSCG EMAIL SHOULD BE RECEIVED BY OR SENT FROM AN OFFICIAL HSCG EMAIL ADDRESS.

EMAIL ACCOUNTS & FORWARDERS

All HSCG email accounts and forwarders are @soapguild.org addresses. (For easier reading, in this policy, the account names will be referenced without the “soapguild.org” portion of the address.)

Email accounts or forwards are generally assigned to a position or job title, such as *MbrServices@Conference@*, *Webmaster@*, or *OfficeManager@*. In this way the email address will remain the same regardless of who is responsible for the job functions.

Each person may also be assigned a personal email address using their first initial and last name, such as *HSmith@* (Helen Smith) or *WJones@* (William Jones).

A system of accounts and forwarders exists to ensure that all members of a specific group get the emails sent to that group and to make it easier for individuals to manage their incoming emails from several accounts. For example:

- ◆ Accounts exist for *President@*, *VicePresident@*, *Treasurer@*, and *Secretary@*. Each account is forwarded to the personal email of the person holding that position.
- ◆ *ExecComm@* forwards to the members of the Executive Committee: *President@*, *VicePresident@*, *Treasurer@*, and *Secretary@*. As noted above, each of those accounts in turn forwards to the personal email of the person holding the position.
- ◆ *Directors@* forwards to the personal email address of each board member.
- ◆ Each of the primary positions for the conference has an email address (*Vendors@*, *SoapersShowcase@*, etc), which is then forwarded to the person responsible for the job.

Due to the potential issue of spam being forwarded (which can cause an account to be blacklisted), the HSCG has the following policy:

NO HSCG EMAIL MAY BE FORWARDED TO AN OUTSIDE (NON-HSCG) EMAIL ACCOUNT.

The Office Manager or Webmaster is responsible for creating and monitoring HSCG email accounts and forwarders.

ACCESSING EMAIL

There are two different methods to access emails. Each method makes the email available on your device, the difference is in how the emails themselves are stored.

IMAP (INTERNET MESSAGING ACCESS PROTOCOL)

- ◆ Emails are stored on the server.
- ◆ Sent messages are stored on the server.
- ◆ Emails can be accessed on multiple devices.
- ◆ What is on the server syncs with the device(s).

POP3 (POST OFFICE PROTOCOL)

- ◆ Emails are downloaded and stored on a single device (although it can be set to retain the messages on the server for period of time).
- ◆ Sent messages are stored on a single device.
- ◆ Emails can only be accessed from a single device.
- ◆ What is on the server does NOT sync with devices.

MESSAGES RETAINED ON THE SERVER

In reduce the amount of space required on our server for email, the following rule applies to all HSCG email accounts:

ALL HSCG EMAIL MUST BE DOWNLOADED OR DELETED FROM THE SERVER WITHIN 30 DAYS.

EMAIL CLIENT

Accessing email require a program, app or web interface of some kind. This interface is called an “Email client.” Some examples include webmail, gmail, Apple mail, Outlook, Thunderbird, Windows Mail, etc. There are numerous free and paid programs and apps that work on different devices and operating systems.

SETTINGS

While each different app or program will have a slightly different interface, the settings necessary to access the email on the HSCG server are generally as follows (you may need some, but not necessarily all, of these settings):

- ◆ **USERNAME:** The full email address (i.e. conference@soapguild.org). Some programs/apps will default to just the first part (i.e. “conference”); make sure the full email address is entered.
- ◆ **PASSWORD:** The exact password as supplied by the Office Manager. Capitalization does matter. The password may contain numbers, letters and/or characters. It’s best to copy/paste the password to ensure there are no errors.

- ◆ **NAME (OR DISPLAY NAME):** The name you want to show as the “sender” of the email. It should be the name of your HSMG position (i.e. “President HSMG” or “HSMG Conference Vendor Coordinator”).
- ◆ **EMAIL ADDRESS:** The full email address, i.e. yourname@soapguild.org or facebook@soapguild.org. Capitalization does not matter.
- ◆ **TLS SETTINGS (RECOMMENDED):**
 - **INCOMING SERVER:** mail.soapguild.org
IMAP Port: 143 POP3 Port: 110
 - **OUTGOING (SMTP¹) SERVER:** soapguild.org
SMTP Port: 25 or 587
- ◆ **SSL SETTINGS (NOT RECOMMENDED):**
 - **INCOMING SERVER:** mail.soapguild.org
IMAP Port: 993 POP3 Port: 995
 - **OUTGOING (SMTP) SERVER:** soapguild.org
SMTP Port: 465
- ◆ **AUTHENTICATION:** IMAP, POP3 and SMTP all require authentication. The SMTP (outgoing) authentication setting may be located separately from the others.
- ◆ **LEAVE A COPY ON THE SERVER:** Setting will vary depending on which device you are setting up. At least ONE device must be set up to remove copies from the server within 30 days. (See examples below)

EMAIL MANAGEMENT

How a person manages their email and the settings required will vary depending on their devices, apps, personal preferences and how they are already getting their email. The settings above should provide access to the email accounts.

There are too many possible variations of setups using a wide variety of programs and apps to be able to give exact directions. However, the examples below give some ideas on how email could be managed in different circumstances.

EXAMPLE #1 - COMPUTER ONLY

Person has a computer (laptop or desktop) on which all email is transacted. If they have a phone or tablet, they don't access email on it.

- ◆ **COMPUTER:** Using a downloaded email client program (such as Windows Mail or Thunderbird), add HSCG email account set up with POP3 connection to download the email and thereby save it to the computer. “Leave a copy on server” set to NO (all email is downloaded to the computer and removed from the server).

¹SMTP: Send Mail Transfer Protocol. The method for sending email.

EXAMPLE #2 - PHONE AND COMPUTER

Person has a computer (laptop or desktop) on which most work is conducted. A phone is used to access and check mail on-the-go.

- ◆ **PHONE:** Phone using email app such as AppleMail or Samsung Mail, add HSCG account with IMAP connection so you can see and respond to incoming emails. Anything done on the phone will sync to the server.
- ◆ **COMPUTER:** Using a downloaded email client program (such as Windows Mail or Thunderbird), add HSCG email account set up with POP3 connection to download the “Leave a copy on server” set to 15 - 30 days (personal preference) so older emails can still be viewed on the phone for up to that period of time.

EXAMPLE #3 - WEB-BASED EMAIL CLIENT

The person uses a web-based email client, such as Outlook.com, gmail, Yahoo or the Apple/Mac equivalent. In this case the email client downloads email from the HSCG server, and holds it on their server, accessible through their email interface. Web-based email clients have a website to access the email and many have corresponding apps for different devices.

- ◆ **EMAIL CLIENT:** Set up, using the settings above, the client to access the HSCG email account. Set “Leave message on server” to NO.
- ◆ **PHONE:** Use appropriate app to access the account. (For example, gmail has a mobile app that will automatically interface with your gmail account). No additional settings should be necessary.
- ◆ **COMPUTER:** Access the email account through the website interface for the email client. No additional settings should be necessary.

TROUBLESHOOTING

- 1) Check all the settings above, especially the username and password. Make sure there are no typographical errors.
- 2) Verify the port numbers are correct. Sometimes they are hidden under some sort of advanced or window and have different default settings.
- 3) Google search for step-by-step directions to set up your mail program or app. Follow the directions, step-by-step, using the settings above.
- 4) If you use a default email account provided by your internet service provider, they sometimes only allow you to send email from the email account you have established with them. If that’s the case, you’ll need to call your ISP to see if they have settings to allow sending from a different account and what the settings are.

PRIVACY AND SECURITY

All HSCG email is covered by the HSCG Privacy Policy. The person receiving, viewing and sending email on behalf of the HSCG is responsible for ensuring the privacy and security of all email content.

Where email is being handled on a personal device (phone, tablet, laptop or computer), it often occurs that the HSCG email is being handled concurrently with other personal email in the same

program or app. In such as case, HSCG email should be segregated in some way (via folders, tags, accounts or whatever method applies best in the app). Access must be restricted to only the person who is authorized by the HSCG to have the account. If email accounts or apps are shared with others (spouse, partner, etc), then some other method of handling HSCG email must be implemented to ensure the HSCG email remains secure.

An individual is only authorized to use an HSCG email account for the duration of their position as staff, volunteer, board or sub-contractor.

UPON TERMINATION OF THE POSITION WITHIN THE HSCG:

- ◆ **ANY IMPORTANT EMAILS THAT SHOULD BE RETAINED BY THE ORGANIZATION MUST BE FORWARDED TO THE EXECUTIVE DIRECTOR OR OFFICE MANAGER; AND**
- ◆ **ALL EMAIL SENT OR RECEIVED IN THE HSCG EMAIL ACCOUNT AND THE EMAIL ACCOUNT ITSELF MUST BE DELETED FROM ALL DEVICES.**

When a person is not longer holding a position for which they should receive email, the email account(s) are closed and any email is temporarily forwarded to the Executive Director or Office Manager to ensure no member emails are lost.

QUESTIONS OR ISSUES

Any questions or issues concerning accessing HSCG email accounts should be directed to the Office Manager. She can provide and/or reset passwords to any email accounts.

Approved
by the Board of Directors

History:

March 5, 2019 (v1) Original publication date.

July 11, 2019 (v1.1) Updated to correct typographical errors and set current connection information.