

BCS, THE CHARTERED INSTITUTE FOR IT

LIST SERVER GUIDELINES

Responsible Body	Community Team
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Prepared by	Kerry Wear, Community Coordinator
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THE BCS LIST SERVER

GUIDANCE NOTES

The BCS List Server is one of a series of tools developed as part of the Institute's services. It is a facility available for use by BCS, Member Groups, Boards and Committees to send email communications to members and other contacts. The following notes explain features of the system and notes on how to use the BCS List Server.

Please note that for all Boards and Committees it will be operational only in Interactive mode.

1. What is the BCS List Server?

The List Server manages mailings for groups of users. It produces multiple copies of a standard message; each addressed to a different email drawn from a pre-defined list. It can include any number of individuals.

2. How does it work?

Held on the central BCS contact database, Catalyst, are contact details for all those included on a list, except for non-members. This arrangement has the following advantages:

- Each mailing list used by the List Server will be regenerated from the database regularly (generally by an overnight update) to include new additions and removing outgoing list members, as well as updates to contact details.
- Instructions to unsubscribe and suspend list membership, received from list members, will be reflected automatically in their record by the same overnight update routine.
- **Boards & committees** - It is important to note that defined members of a Board or Committee should not unsubscribe from that particular list. When you leave the Board/Committee, your record will be updated, and you will automatically leave the list. There may be instances, though, such as working overseas or illness, that make it necessary for you to unsubscribe temporarily. If you need to use this facility, please follow the instructions in the footer of the message and inform your Chair and email coordinator. To rejoin contact groups@bcs.uk

3. What types of list are available?

There are two main types of lists created within the List Server facility:

- 3.1. Permanent lists** – those retained and maintained for future use, possibly regularly – for example, the individual Member Group, Board and Committee lists that will be used to send regular communications to members.
- 3.2. Ad hoc lists** – specific mailing lists are created, which may not be used again – for example, to mail membership upgrade information to all student members due to graduate this year. Member Group non-member lists fall under this category.

4. What are the two modes of operation?

There are two main modes of operation:

- 4.1. **Broadcast mode (not for Boards and Committees)** – used to send information from a central point to those on the list. Typical uses are newsletters and notifications of Member Group events, but not used for Boards and Committees.

4.1.1. Email coordinators

The role of an email coordinator is to:

- independently operate their broadcast list
- issue messages to their membership via their broadcast list from their specified email address
- request the set up of any additional lists (see item 10 below)
- approve the content of the message (generally restricted to BCS business)

4.1.2. Standard footers

The system appends a default footer to all broadcast emails, which includes the standard BCS disclaimer.

4.1.3. How to send a message

- Send the text of the proposed message to the relevant email coordinator in plain text.
- Only appointed email coordinators can send to the list from a specified email address (each Member Groups can select a maximum of four.)
- The email coordinator determines the suitability of any proposed text.
- The email coordinator will send the approved messages to the appropriate list address for receipt by all members who are on email.
- The email coordinator will receive a confirmation of how many the recipients will receive the email.
- **The email coordinator must always post from the specified registered email address on the List Server.**

Please note: It is important not to post to more than one list at a time, as only one of the addresses included will publish successfully.

4.1.4. Forwarding emails from 3rd parties

From time-to-time 3rd parties with interesting subjects or joint events communication arrives in your mailbox.

- Care should be taken on how the message is forwarded to the list.
- Just forwarding emails may lead to a data breach.
- The email coordinator ensures that any irrelevant conversation threads are removed.
- That any email addresses are removed even if they are committee members.
- If permission has been granted for emails addresses to be forwarded, then the email address for replies needs to be highlighted within the forwarding email.
- The basic rule is **THINK** before you **FORWARD**.
- Training and reminders will be made available to the volunteer committee throughout the year/s.

4.1.5. Content

The message text should typically be restricted to BCS business but will be at the discretion of the email coordinator. **Plain text is recommended** to reduce traffic and keep data conversion to a minimum

It should **always** be made evident to the recipient from whom has sent the message. Therefore, the sender should include their name, role and email address at the end, as best practice. This practice allows recipients to make contact if they are unclear to whom to send the reply, which is especially necessary on broadcast lists where they cannot reply to the list address.

If you wish to send a message to the members or committee of another SG or Branch – for example, to publicise an event – you should send the text of the proposed message to your Community Coordinator to facilitate this.

4.2. Interactive mode – Used for Boards and Committees to allow those on the list to send messages – for example, a list member who receives a message will be able to post a reply that will be issued by the List Server, to all others on the list or just to the sender. Typical uses include lists of committee members and those created for specific discussions.

4.2.1. Standard footers

The system appends a standard footer to all interactive emails, which does not add the BCS disclaimer in this mode.

4.2.2. How to Send a Message

Only Board/Committee members can send a message to the list. You must send this message from your default email address on our system. If this is a forwarding account, you may encounter problems. If so, refer to item 5.

Interactive lists have the facility for the recipient of a message to reply either to the sender, the list and the sender, or just the list.

- To reply to the sender only, use 'reply'.
- To reply to the list and the sender, use 'reply to all'.

In all cases, please ensure you have selected the required address before sending.

The list server includes the instructions in the footer of every message.

5. Post failures – Broadcast and Interactive Lists

The system returns rejected messages with an explanation. See **Appendix 1** for further information and possible course of action.

If the suggested course of action does not resolve the problem, send a mail to groups@bcs.uk, with the original error notification message attached.

Alternatively, you can check your contact details (for interactive mode only) online at www.bcs.org/login.

6. BCS email policy (applies to all users of List Server)

The List Server facility makes it straight forward to send email messages to large numbers of members, customers and contacts regularly. But we must avoid using the lists in a way that could be regarded as illegal – for example under the General Data Protection Regulations

(GDPR) – or unethical. Even where inclusion is entirely legal, individuals may feel that there is an abuse of their membership if they receive too many postings from BCS sources.

6.1. Opt-in or opt-out?- Legislative requirement

The Privacy and Electronic Communications Regulations that came into force on 11 December 2003 require us to gain explicit opt-in consent from all new members/contacts from that date. We cannot send emails that contain information of a marketing nature to anybody who joined us after 11 December 2003 who has not provided us with their consent to receive such emails.

The default on our system is that you will not be able to communicate with new members/contacts unless they have “opted-in”.

‘Opt-outs’ are not permitted from Committee lists. Committee members can only opt-out of receiving these emails by leaving the Committee itself.

7. General Points to Note

Please note that lists will not usually be despatched from the List Server immediately. You should allow at least half a day for it to process and at busy times this could be greater.

Please refrain from using digital signatures when posting email messages to the list server. While the list server can itself cope with digital signatures, the recipient machines (e.g. other list members) will need their email clients configured explicitly to work with digital signatures.

Please don't use individual CCs on lists as in the majority of cases, we have established that the individuals are already on the list and they receive the same email twice.

8. Non-receipt of Messages

Messages from the BCS list server sometimes fail to appear in a recipients email Inbox. The most likely cause for this is that the message has been (incorrectly) identified as spam and either rejected or placed in another folder (“junk/spam”).

To release individual emails – or circumvent the problem, a recipient must add the domain to the safe list, authorised sender list or whitelist of their email client.

9. Viruses

The List Server has anti-virus software which will prevent viruses from sending through it. The anti-virus definitions are updated automatically whenever new definitions are released.

10. How to create a list

Member Groups

We have already created the Member Group member, and committee lists and notified all existing/new email coordinators or committee members. The former to contain the addresses of all members assigned to the group, and operate in broadcast mode, the latter to include all Committee Members and works in interactive mode.

If you would like to request the creation of a new list, please contact [**groups@bcs.uk**](mailto:groups@bcs.uk)

To decide on a list name, use [**xxxcom@lists.bcs.org.uk**](mailto:xxxcom@lists.bcs.org.uk) for committees and [**xxxmem@lists.bcs.org.uk**](mailto:xxxmem@lists.bcs.org.uk) for members.

Please note that once lists have been set up, we are unable to alter the names. It is advisable to choose short and memorable names.

If you wish to produce a list for an ad-hoc working group or a non-members list, please email groups@bcs.uk

11. How to add non-members to the Database

If you wish to contact non-BCS members whose details you hold separately, please contact groups@bcs.uk, and we'll create a non-member list to add them to for you to contact.

Appendix 1 - List post failures when posting messages to the BCS list server

Interactive Lists: You will not be able to post messages to this list if you are sending from an email address other than your *default* address on Catalyst.

Broadcast Lists: You will not be able to post messages to this list other than from your *specified* email address.

The reason for this is that the automated List Server security management is expecting to see the sending address and receiving address as the same and where these are different, the message will reject.

There are two particular situations in which this is likely to arise:

1. When you are away from your home base and using an account, such as Gmail, rather than your usual account. You will be able to receive messages sent by the List Server, provided that you have set up the necessary forwarding arrangement, but any response from your Gmail account will reject.
2. Where your subscription address relates to an account that forwards your received messages to another address from which you collect them - for example, if your subscription address is a BCS forwarding account, but you manage your messages by logging on to a Gmail account. As in the previous case, responses sent from your Gmail account will reject.

It is possible to amend your email clients settings to help the list server to accept the correct posting address. You'll need to change your reply-to settings to match with the alternative account you wish to use, such as a BCS forwarding email address. If this doesn't work, we recommend using a non-forwarding email address with the list server.