Managing Instant Messages

The purpose of this guide is to assist with the proper organization of Lync/Skype instant message conversations in Outlook. This guide supplements existing policies, standards and practices related to the management of information in the Government of Alberta.

If left unmanaged, instant message conversations affect not only the performance of Outlook, but also productivity. Sorting through hundreds of items is time-consuming and inefficient.

This guide covers:
- categorizing instant messages; and
- deleting transitory instant message conversations.

NOTE: This guide is specific to Outlook 2010, but may be relevant to other versions.

Deleting Transitory Instant Messages

Lync/Skype does not save instant message conversations by default. If an instant message conversation documents a business transaction or decision, it must be saved and managed as an official record. To save a conversation, place the cursor in an active conversation window and press Ctrl + S. Conversations will be saved to the **Conversation History** folder in Outlook.

Prior to deleting saved instant message conversations, consider the following:
- Do any of the items feature content or attachments that should be retained and filed in an official records system?
- Are there reasons that items should not be deleted? For example, are the items used as reference materials?

Steps

1. From the **Home** tab of Outlook, click on **Mail** (typically located on the lower left side of the screen).


2. Select the **Conversation History** folder (typically located below the **Deleted Items** folder).

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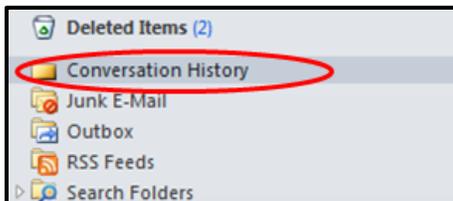
3. As with calendar items and email messages, it is recommended that important instant message conversations (i.e., those that could be considered official records) are **Categorized** to prevent accidental deletion.

4. To categorize a conversation, place the cursor over the small white box to the left of the conversation you wish to categorize, and right-click to open the categories menu.
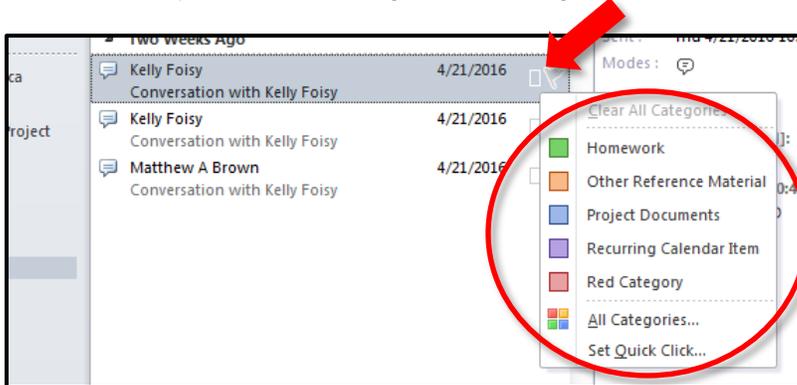
5. Select a category and assign it to important instant message conversations. **It is recommended that a currently unused category is selected for instant message conversations, and that the same category is used for all important instant message conversations.**
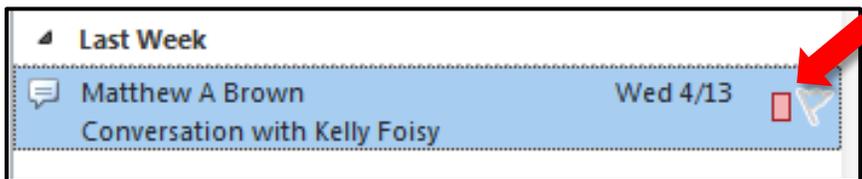
6. With necessary instant message conversations categorized and reviewed, it is now safe to manually delete any unnecessary or otherwise transitory conversations. Select any instant message conversations to be deleted. Shift + arrow keys allows selection of multiple sequential items; holding down the Ctrl key and clicking allows selection of multiple non-sequential items. Right-click and choose **Delete** to move selected items into Outlook's **Deleted Items** folder.
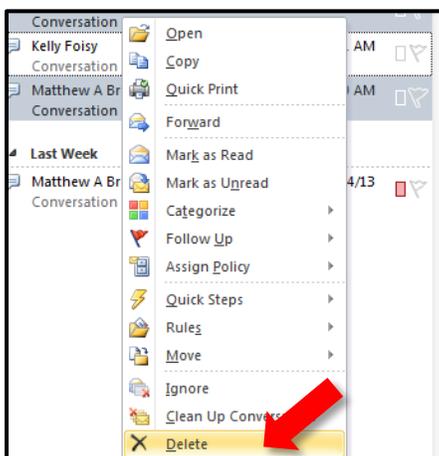
Things to Remember

- Categorizing important instant message conversations may prevent inadvertent deletion.
- If your business area is involved in any FOIP and/or litigation hold activity, please contact your department FOIP coordinator and/or senior records officer before deleting any items.