Best Practices for Team Communication Platforms

Project Channels
Create activity or project-specific channels, then delete when done. Separating conversations lets you follow only the channels you need.

Keep It Transitory
General exchanges of information and brainstorming can be deleted as soon as they have outlived their usefulness. No policy-level decisions. No requesting or receiving approval.

Keep the Goods Outside
Link to files outside the application instead of attaching. Keep records on a shared drive where they can be accessed and deleted at the end of their retention.

Annual Clean-Outs
For general channels which aren’t project-specific (cookies in the break room, Hail’s running late), label each channel with the current year then delete annually.

Control Access
Tie access to NetIDs and remove employees when they separate. Don’t add more people to channels than necessary. Assign application management to specific persons/positions.

Keep It Safe
Never include any confidential/personal information, including credit cards, student/academic research, or HIPAA-protected records.

This Is Public
Remember no matter how transitory, your messages are still subject to Public Records Requests. Ensure someone who can search and produce records has access to all of the channels.

Stay Sane
Mute or leave channels you don’t need, control notifications, and tailor when and how you receive messages.

UW Records Management Services
http://finance.uw.edu/recmgmt