Records Management Guidance
Teams – Detailed Guidance

This document provides basic guidance for managing records in Teams and explains how different elements in Microsoft Teams can be captured and filed to Content Manager. For more general information about using Teams, visit the SharePoint and Teams Best Practices.

Basic Teams Guidance:

- If a record exists, regardless of its retention period, it may be subject to disclosure or discovery. This includes Teams Emails, Channel Messages, Files, Pages, etc.
- The retention requirements for records in Teams is dependent upon the function of the record, not where it is created and stored.
- Keep Teams chat conversations transitory, they are automatically deleted. Posts should remain transitory in nature as well.
- Identify how these records will be managed and the responsibilities of records owners. Who is responsible for the records created and how will they be managed?
- Be sure to delete transitory files when no longer needed
- File records with retention value into Content Manager when they reach their cutoff.

Know where your Teams records are stored:

Records created through Teams sites are stored in various places, but it is possible to **manage these records effectively**. If information needs to be exported or filed to Content Manager, these are available options.

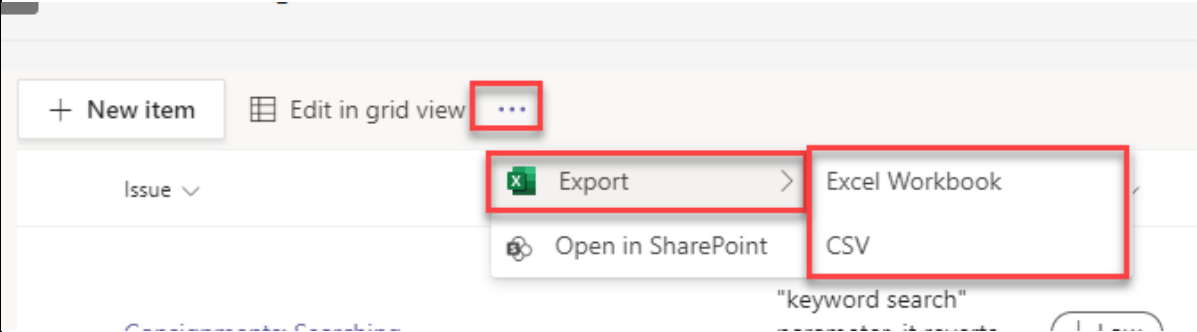| Teams Record	Filing to Content Manager
Entire Teams Site or Channel	There is no functionality to export/manage the entirety of a Teams site. Follow guidance below to access different site/channel elements and manage as needed.
Call Histories	There is no functionality to export call histories from Teams. Call histories are transitory records. If call history needs to be produced, copy and paste into a text file or take screenshots and save as image files, both of which can be filed to Content Manager.
Deleted Items	Items are NOT automatically deleted. They can be accessed by opening the Teams site in **SharePoint** and then navigating to the **Recycle Bin**. From there, you can restore individual items, permanently delete items, or Empty the recycle bin.
Documents (Files)	Unstructured data files (Word, PDF, JPEG, HTML, etc.) in Teams' Files/Documents folder and subfolders can be filed to Content Manager. Follow existing guidance (**Sync to OneDrive**, and then file from **File Explorer**).

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RECORDS MANAGEMENT

Folder Columns (Additional Metadata)	If additional columns (i.e. metadata fields) are manually added to a Teams/SharePoint folder structure, that data can be exported into an Excel spreadsheet. To do so, complete the following: * **Open the Teams site in SharePoint** and then navigate to **Documents**. * Click on **Export to Excel** and follow prompts to **save as an IQY file** in your file explorer. * Navigate to the IQY file, **double click to open it**, and select **Enable**. * In the Import Data window, leave defaults selected and click **OK**. The complete file list and folder structure of the SharePoint (Teams) site will be listed in an Excel spreadsheet. Click Save As to **save this as an Excel Spreadsheet** that can be filed to Content Manager. Note that if you separately filed the individual documents into Content Manager, it is **not** possible to have all metadata columns filed to Content Manager *along with* the documents. But, you can follow this process to retain the metadata which can be used as a crosswalk; you can also manually add metadata from the spreadsheet to records in Content Manager (including folders).
Lists	*Each* list must be *individually* accessed and exported to Excel or CSV (either in Teams or SharePoint view). Click the **ellipsis button** towards the top and select **Export** then choose the **file type**. After export and saving, they can be filed to Content Manager.. There is no known way to export more than one list at a time. _
Meetings – Recorded	When a meeting is recorded, the recording will be available in the "Recordings" folder within OneDrive, available for 90 days in the folder and then removed. It will be available in the chat history of the meeting. You can individually manage the recordings (locate the file, click the ellipsis button and chose Download or Move, pick a OneDrive folder and then file to Content Manager from File Explorer). Or, you can manage/file these along with the rest of the files in the site (see "Documents" section).
Chats	By policy chats are not retained and set to delete as soon as possible. Messages might disappear from view within three days but can be retained in servers up to 17 days. During that time, they are discoverable and subject to public disclosure. Some chats may be retained longer if they are subject to legal hold. If chats need to be captured before they are deleted, workaround options are:

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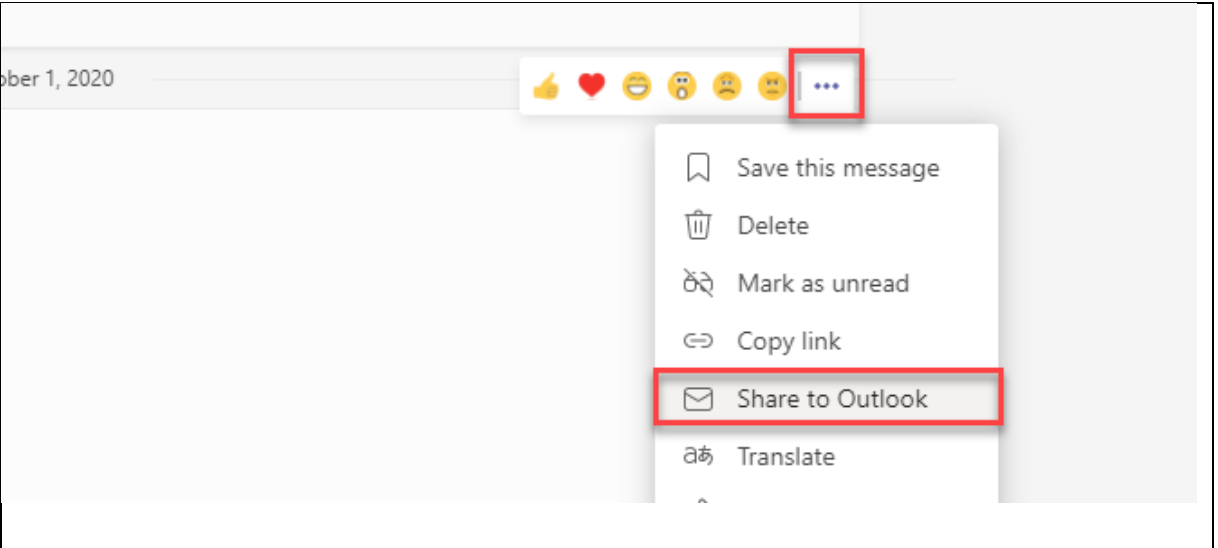
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	1) take screenshots and save locally as image files and file to Content Manager 2) copy-and-paste into text files and save locally and then file to Content Manager
Chats (Shared Documents)	By policy chats are not stored and set to delete as soon as possible, (see above). However, *documents* uploaded and shared within a chat are available from a "Microsoft Teams Chat Files" folder within each user's OneDrive. From there, they can be filed directly to Content Manager or deleted if transitory.
Posts (Conversations)	There is no functionality to export "posts" (also referred to as conversations). However, it is possible to receive notifications in Outlook of some Posts. This is applied through a Teams setting. Notifications will arrive in your email. These are transitory records, but may need to be saved and provided in the event of a public records request. In Settings, select Notifications, and select how you would like to receive notifications - To be notified about all your shown channels, select **All activity** - To be notified only when you are @mentioned or when you receive replies to your messages in channels, select **Mentions & replies** - For the most control over your channel notifications, select **Custom** **Teams and channels** You will get desktop and activity notifications for: **All activity** — New messages, reactions, and all mentions **Mentions & replies** — Personal mentions and replies to your messages **Custom** — Choose what you get notified for and how To save Teams Posts, if necessary, other workarounds are possible: 1) select all posts, copy and paste into a text file that can be saved locally and filed to Content Manager (loses formatting, look-and-feel, any images, etc.) 2) take screenshots of the posts and save as image files that can be saved locally and filed to Content Manager (loses original format, loses links, etc.) 3) for each post, click the ellipsis button in the top right corner, Share to Outlook and you can then file to Content Manager directly from Outlook (this must be *individually* done for *each* post on the Channel)

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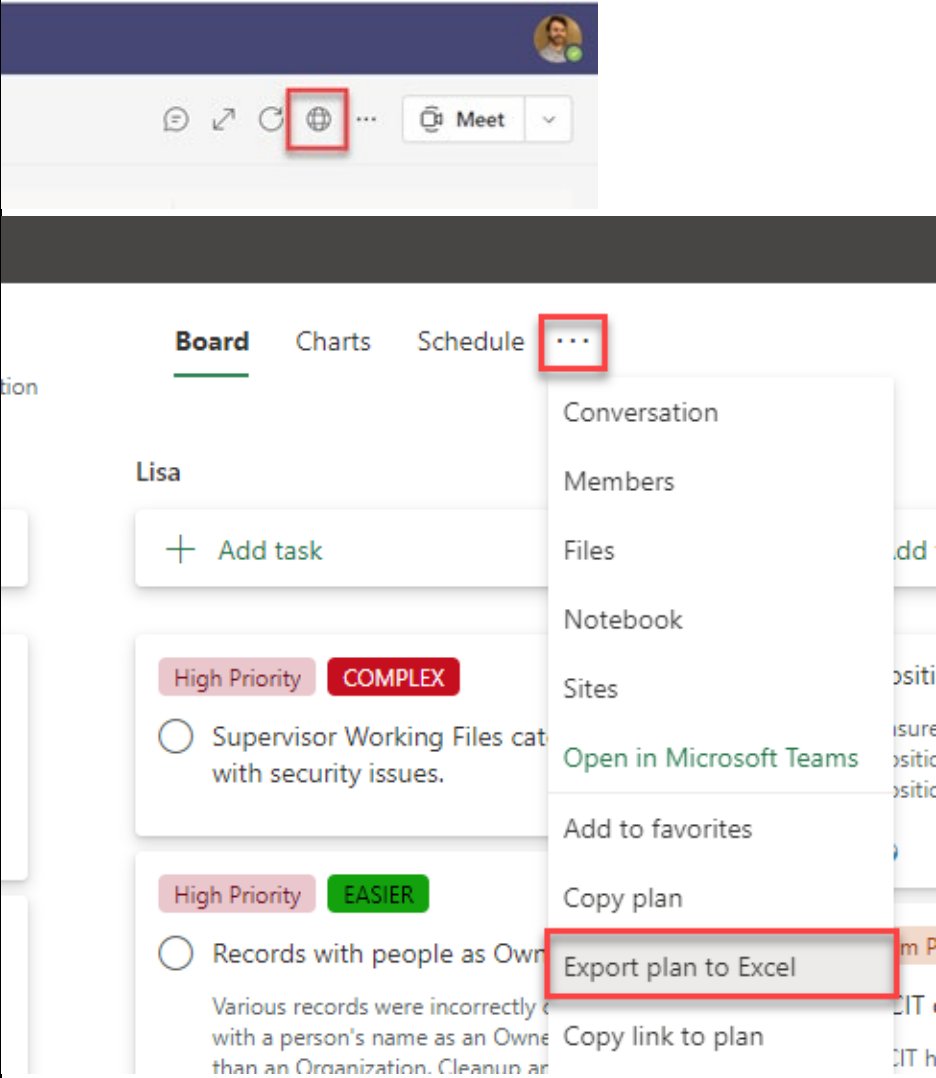
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OneNote	OneNote files (.one files) cannot be exported or managed in Content Manager. Saving a notebook will only create a link to the OneNote file. Records created in OneNote should either be transitory only or notes to be formalized in another format – such as you would if you were taking handwritten notes for a meeting and then finalizing them in a Word version to distribute. You can still capture the text from OneNote through this process: • Open the OneNote notebook in the desktop application. • Select the page or pages you wish to save by highlighting one or multiple pages. • **Right click** on a highlighted page and select **Copy.** • Then, open a blank Word document and **Paste.** You can edit and finalize the information in Word and save the Word version to Content Manager. • Be sure to delete the OneNote notes once the final Word version is created. (Note it is **not** possible to file them using the Sync method for the rest of the Documents/Files, the Notebook file in that process is just a URL.)

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Planner	From within Teams, click the **globe icon** (Go to Website) to open in Planner, then select **Export plan to Excel**. An Excel spreadsheet with all contents can then be filed to Content Manager from Windows File Explorer. To retain the look-and-feel of the planner, you must take screenshots and save (and file) them as image files.
Wikis – Text	There is no functionality to export Wikis directly from Teams (aside from uploaded images, see below). Workaround options – copy and paste into a text file or take screenshots and save as an image file, both of which can be filed to Content Manager from Windows File Explorer.
Wikis – Images	Images pasted/added to a Wiki are available by opening the site in SharePoint, selecting Site Contents and Teams Wiki Data. From there, they can be tagged, and then moved or downloaded.