



# Records Management Guidance

## Managing Records in Microsoft “Teams”

Microsoft Teams is a collaboration platform provided through O365. Teams allows county employees to communicate in a variety of ways, including video meetings, file storage, and email. Teams integrates with other O365 platforms to provide a single source access for communication and collaboration. While Teams allows for a unique mix of communication styles, this also presents unique challenges for managing the variety of records created. This guide will help you understand where records are stored once created through Teams and how to best manage them.

### Basic Teams Guidance:

- If a record exists, regardless of its retention period, it **may be subject to disclosure and discovery**. This includes Teams Emails, Channel Messages, Files, Pages, etc.
- The retention requirements for records in Teams, like all other records, is dependent upon the **function of the record**, not where it is created and stored.
- Records created through Teams sites are stored in various places, but it is possible to **manage these records effectively**.
- When creating or joining a Teams site, users receive access to unique SharePoint site, email box, and folder stored in user’s One Drive. These **records storage places are all automatically created** when the site is set up.

### Know where your Teams records are stored:

When a Team site is created, a unique Team SharePoint site and Group Mailbox are created, as well as a folder in each user’s OneDrive to store files. Teams records are automatically stored in these places.

One-on-One Chats	Not enabled in Teams at this time
Meeting Recordings and Voicemail	Not enabled in Teams at this time
Team Channel Messages	Teams SharePoint and the Teams Group’s mailbox and are searchable. Also accessible in Teams members Outlook.
Group Emails	Teams Group’s mailbox and are searchable. Also accessible in Teams members Outlook.
Files <i>shared</i> during a one-to-one or group chat	User’s OneDrive in a folder called Microsoft Teams Chat Files.
Files (in the Files Tab)	Teams SharePoint site
Wiki Pages	Teams SharePoint site





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### Manage your Teams records:

- **Identify the retention requirements for your Team project.** Are they part of a Capital Improvement Project, general Project File, primarily review and editing, etc.? What business functions does the Teams site support?
- **Identify how these records will be managed and the responsibilities of records owners.** Who is responsible for the records created? How will they be managed once the project is complete and records are no longer needed? Will they be filed to Content Manager to be retained for their retention requirements?
- Be sure to **delete transitory records.**

