



MS Teams Records Management Guide

Microsoft Teams

Microsoft (MS) Teams is a communication and collaboration tool in Office 365. Features include team chat, one-on-one chat, document collaboration, video meetings, and integration with certain shared applications. Each MS Team has a designated Team Owner, or co-owners.

All information in MS Teams is subject to access requests under [Freedom of Information and Protection of Privacy Act](#) (FOIPPA). Data and documents in MS Teams are stored in Canadian data centres.

Note: MS Teams implementation has been accelerated in response to remote work requirements necessitated by the COVID-19 pandemic. As changes to MS Teams are implemented, this guide will evolve.

This guide addresses the following elements when using MS Teams:

1. Recordkeeping Roles and Responsibilities
2. Managing Information in MS Teams
3. Access and Privacy

Recordkeeping Roles and Responsibilities

Government bodies must create and keep adequate records sufficient to document their decision-making and work activities, in accordance with government information management policy and standards.

MS Teams is a communication and collaboration tool; it does not have the necessary functionality and controls for an appropriate recordkeeping system. Therefore, when working in MS Teams:

- **Employees** are responsible for ensuring critical information that they

create or receive is filed in an appropriate [recordkeeping system](#)

- **Ministries** should continue to use their current recordkeeping systems, such as:
 - government standard [EDRMS Content Manager](#)
 - LAN organized according to ARCS and ORCS
 - line of business applications

It is particularly important for Team Owners to ensure that critical records created in MS Teams are filed in the appropriate [recordkeeping system](#).

Critical records, defined in the Managing Government Information Policy, include official or final copies, substantial drafts, correspondence, and other records that document decisions and actions.

Additional considerations:

- When a Team comprises an inter-ministry or inter-jurisdictional committee, identify a lead ministry to be responsible for the committee's records.
- Designate the responsibility for information search and response to FOIPPA requests and other legal obligations.

Documenting Government Decisions

To comply with the [Information Management Act](#) government bodies must:

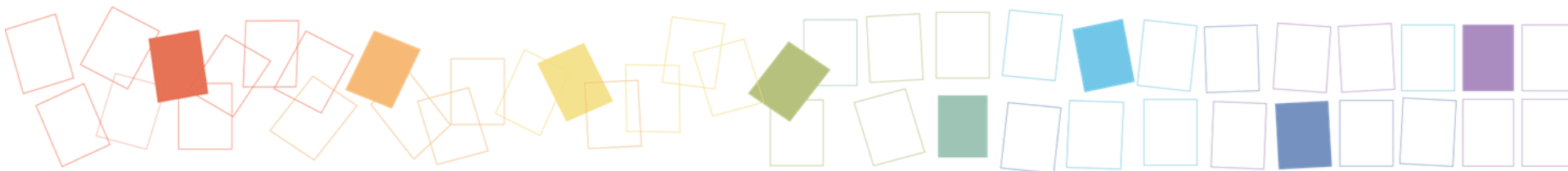
- ensure that an appropriate system is in place for creating and maintaining government information
- create and maintain adequate records of their decisions

If records in your collaboration tool contain important decisions, they must be retained.

For more information on what constitutes an appropriate system, and the requirements to document government decisions, see the [Chief Records Officer Guidelines on Documenting Government Decisions](#).

For additional information on managing government information using information technology resources, please refer to the [Appropriate Use Policy](#).

As MS Teams implementation evolves, guidance will be updated.



Managing Information in MS Teams

File critical information from MS Teams to a recordkeeping system:

1. download the information to a temporary location (e.g. OneDrive or personal drive), then
2. upload this to your office's appropriate recordkeeping system .

Managing Records in MS Teams

Because MS Teams is not an appropriate recordkeeping system, and critical information is to be filed elsewhere, MS Teams primarily holds [transitory](#) information (i.e. information that is not required to meet legal obligations or to sustain administrative or operational functions). Transitory information is eligible for deletion in accordance with the [Transitory records schedule](#) when no longer needed.

MS Teams is a tool that enables teams to collaborate on information stored in SharePoint, OneDrive and Exchange. Please refer to the [SharePoint Records Management Guide](#) for further advice.

Managing Chats and Messages

Because MS Teams is not an appropriate recordkeeping system, you must

- document any Teams chat information that provides evidence of a decision or work activity,
- copy, summarize, or transcribe the information to another document, and
- file it in your [recordkeeping system](#).

Teams chat is currently maintained as a persistent chat within MS Teams (i.e. conversation history remains in Teams until the team is deleted). Individual messages can be deleted by their creator, one at a time (the chat will remain, with an indication that a message was deleted), or when the Team has been deleted.

At the time of deployment, chats are retained indefinitely. Future MS Teams implementation may include a defined retention process where inactive Team information, including chat, follows a routine deletion schedule, unless considered relevant to an information search under FOIPPA or other legal obligations.

Documenting Meetings

Document meetings conducted using MS Teams the same way you would any other meeting. This may include an audio or audiovisual recording. The decision to record a call or meeting is at the discretion of the organizer. A banner will appear indicating to participants that recording is underway.

For further guidance on documenting MS Teams meetings, please refer to the [Online Meetings Records Management Guide](#) and Recording Teams Meetings in [Teams Privacy and Security](#) on the Office 365 Portal.



Access and Privacy

Information in MS Teams, like all government information, is subject to FOIPPA. When using MS Teams, ensure that you:

- limit the sharing of sensitive or confidential information (e.g. personal information), as you would with any communication tool (consider that Team membership may change over time and could potentially include external contractors), and
- are prepared to respond to information access requests under FOIPPA or other legal obligations .

For more information, see [Teams Privacy and Security](#) on the Office 365 Portal.

As MS Teams implementation evolves, this guidance will be updated.

Additional Information

Contact your [Records Team](#) or check out the rest of the [Records Management website](#)