

Management of Instant and Text Messages Directive

Data and Content Management Division, Enterprise Content Management Branch

Version: 2.1

Approved by: Alberta Records Management Committee	Owner: Executive Director, Enterprise Content Management Branch	
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Directive Statement

Instant and text messages have joined email as a key method for Government of Alberta communications, and, like email, must be managed in alignment with government content management requirements.

Authority

This directive is issued under the authority of the [Government Organization Act](#) and the [Records Management Regulation](#).

Application and Scope

This directive applies to all departments defined under section 14 of Schedule 11 of the *Government Organization Act* and agencies, boards, and commissions as defined in schedule 1 of the [Freedom of Information and Protection of Privacy Regulation](#).

Agencies, boards, and commissions that are not contained within schedule 1 of the Freedom of Information and Protection of Privacy Regulation are encouraged to align with this directive.

Directive Description

This directive details the information management obligations for all Government of Alberta staff (which includes, but is not limited to, contractors, volunteers, appointees, interns, and students working with a public body) when handling instant and/or text messages.

Directive Specification

1. The Government of Alberta does not endorse or recommend the use of:
 - 1.1 external and/or third-party messaging platforms to which the government has neither purchased a license nor contracted service; and/or
 - 1.2 personal accounts and/or devices for the purpose of conducting government business. Please see the [Mobile Device Policy](#) for more details.
2. Microsoft Teams (Teams), available in both mobile and desktop versions, is the instant messaging platform approved for use in the Government of Alberta.
 - 2.1 While both the desktop and the mobile versions of Teams use the same data source, the desktop version's superior information extraction and export features render it the preferred platform, and the definitive source of truth with regards to generating information.
3. Instant and/or text message exchanges that capture a government business decision or transaction are official records.
 - 3.1 Official records must be retained in official information management systems and managed in accordance with the government's content management policy instruments (e.g., Mobile Device Policy, records retention and disposition schedules).
 - 3.2 Classifying and capturing official records is solely the responsibility of government staff, as instant and/or text messages may not be saved automatically by an application or reliably and/or fully retrievable by third-party service providers (e.g., telecom providers, instant message licensors).
 - 3.2.1 By default, Teams deletes all messages after 24 hours. Any official records created in Teams must be captured and transferred to an official information management system within 24 hours.

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- 3.2.2 For information on capturing and transferring an official record created in Microsoft Teams, please refer to the [Saving and Exporting Messages in Teams Chats Guideline](#).
 - 3.2.3 Please refer to the [Metadata – Core Content Standard](#) for the metadata that must be applied to all electronic information in the custody and/or under the control of the government.
 - 3.2.4 In addition to the mandatory metadata elements outlined in the Metadata – Core Content Standard, sender and recipient metadata (name, date, and time) must be captured for all instant and/or text messages.
4. Instant and/or text messages that do not document a business decision or transaction, or that have no long-term value, may be considered transitory records and can be disposed of under the authority of the records retention and disposition schedule 1995/007-A001 – Transitory Records.
 - 4.1 If there is any doubt about the status of a record, do not treat it as transitory. Contact a supervisor for clarification.
 - 4.2 For more information, please refer to [Identifying Official and Transitory Records Guideline](#).
5. Like email, instant and/or text messages are subject to the [Freedom of Information and Protection of Privacy Act](#), and may be responsive to information access requests and/or litigation.
 - 5.1 The Teams desktop application is the version of the program to be used when searching for and locating information that may be responsive to an information access request.

Compliance

Consequences of non-compliance with this standard could result in the loss of information, damage to Government of Alberta's reputation, exposure of Albertans to harm and/or incurrence of unnecessary costs. Depending on the severity of non-compliance:

- either informal or formal requests and/or follow-ups may be made by Enterprise Content Management Branch, Corporate Internal Audit Services, Corporate Information Security Office, Office of the Information Privacy Commissioner, and/or Public Service Commission, and
- legislated disciplinary action (i.e., *Public Service Act*) may be taken.

References and Supporting Resources

- [Data and Information Security Classification Standard](#)
- [Electronic Document Naming Conventions Guideline](#)
- [Metadata – Core Content Standard](#)
- [Mobile Device Policy](#)
- [Identifying Official and Transitory Records Guideline](#)
- [Records Management Program Standard](#)
- [Saving and Exporting Messages in Teams Chats Guideline](#)

Contact

For information management support, please contact [Enterprise Content Management](#) or the appropriate [Senior Records Officer](#).