

Saving and Exporting Messages in Teams Chats

FOIP and Information Management, Enterprise Information Management
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Guideline Statement

The Chat feature in Microsoft Teams (Teams) is meant for quick communication with other Government of Alberta employees. Teams Chats are flagged for deletion after 24 hours, but it may take up to 7 days for Chats to be fully purged from the system (dependent on how busy the system is, the amount of content, and system configuration).

As per the [Management of Instant and Text Messages Directive](#):

- instant message exchanges that capture a government business decision or transaction are official records;
- official records must be retained in official information management systems and managed in accordance with the government's information management policy instruments (e.g., [Mobile Device Policy](#), records retention and disposition schedules); and
- capturing official records is solely the responsibility of government staff, as instant and/or text messages may not be captured automatically by an application or reliably and/or fully retrievable by third-party service providers (e.g., telecom providers, instant message licensors).

IMPORTANT: Information that is, or is reasonably anticipated to be, responsive to a legal or information access (FOIP) hold cannot be disposed of until the holds have been resolved. For more information on the types of information protected by the *FOIP Act*, please contact the appropriate department [FOIP office](#).

While both the desktop (web based or windows application) 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. The Teams desktop application is the version of the program to be used when locating and exporting information that may be responsive to an information access request.

Guideline Description

There are two primary scenarios that require a Chat message to be captured:

- 1. Captures a business decision and/or transaction that is not recorded elsewhere**
 - When this occurs, the conversation needs to be captured in an appropriate way and managed as an official record in an official information management system.
 - If it is necessary that the Teams Chat conversation be captured verbatim, a process is outlined in the Guideline Specification section below.
- 2. Providing content that is a responsive to a FOIP request or a legal hold**
 - If a FOIP request has been received, any Chat messages that are responsive must be captured and provided.
 - Any Chat messages that are responsive to a legal hold must be preserved until the legal hold is rescinded.
 - Records that are responsive to FOIP requests must be managed in accordance with information management policy instruments (e.g., approved records retention and disposition schedules) upon closure of a FOIP request.
 - In the event that a FOIP request is received, but a Chat has not been captured, an effort must be made to retrieve it.

Guideline Specification

To capture a business decision and/or transaction that occurs in Teams Chat, select one of the following methods:

- creating a follow up email (recommended method);
- creating a Word document.

While it is possible to save Chats in Teams by selecting “Save this message” from the “More options” drop-down menu available when the mouse cursor is held over a message and the ellipsis (...) is clicked, this only saves the Chat conversation in Teams. Teams Chat is not an official information management system, so it is imperative that saved messages are moved from Teams into an official information management system as soon as possible—it is strongly recommended that users create a follow up email or create a Word document.

Creating a Follow Up Email

This is the recommended method for capturing decisions and/or transactions. Include the following information in the email:

- a description of the conversation that took place in the Chat message;
- the date and time the Chat message took place; and
- the outcome of the Chat message.

Send the email to all parties involved in the Teams Chat (and any other parties that may need to be aware of the business decision or transaction).

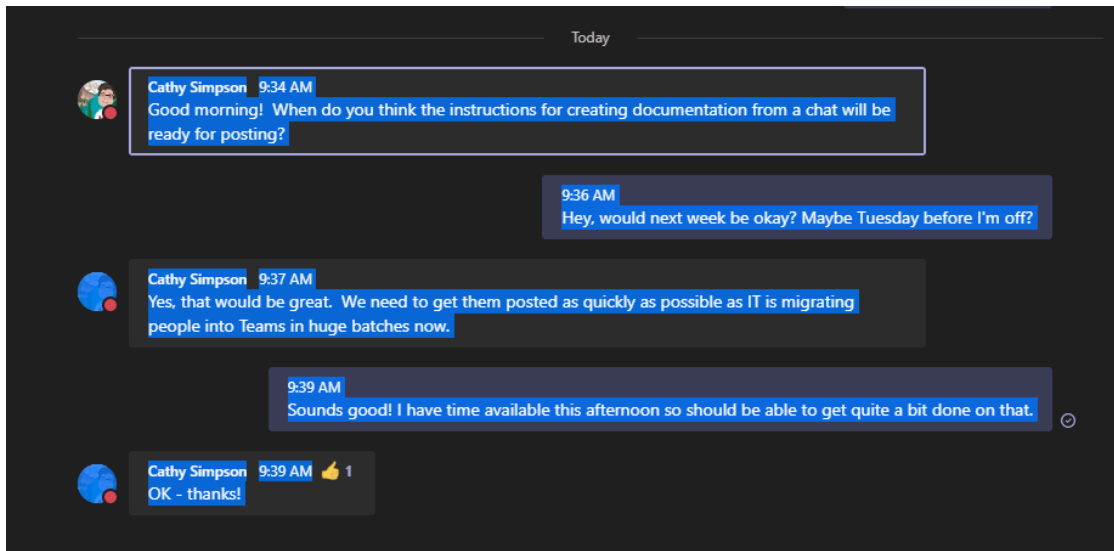
NOTE: Outlook is not an official information management system. The sender of the email is responsible for managing the email as an official record (i.e., transferring the record to an official information management system) in alignment with information management policy instruments (e.g., approved records retention and disposition schedules).

Creating a Word Document

To create a robust, authentic, and searchable record that aligns to information management policy instruments (e.g., the [Records Management Program Standard](#), the [Data and Information Security Classification Standard](#), the [Metadata – Core Content Standard](#), etc.), both the text of the Chat and screenshots of the Chat must be included in a Word document.

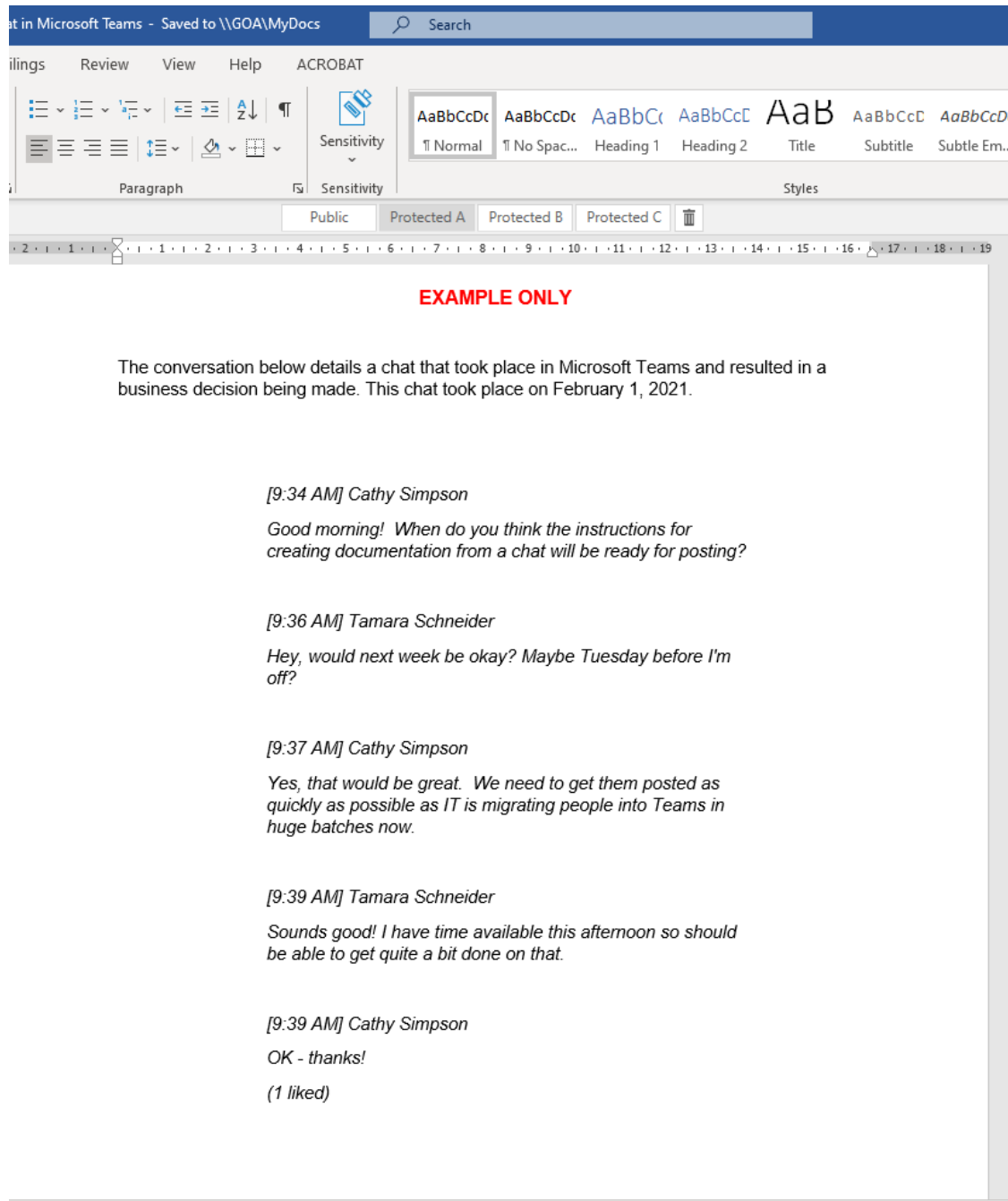
To capture the text of the Chat:

1. Create a new document in Microsoft Word.
2. Click and drag to highlight the Chat message text that is to be captured.



3. Press **CTRL** and **C** **OR** right-click and select “Copy”.


- Place the cursor on the first line of the new Word Document and then press **CTRL** and **V** OR right-click and select "Paste". The Chat message will appear similar to the following:

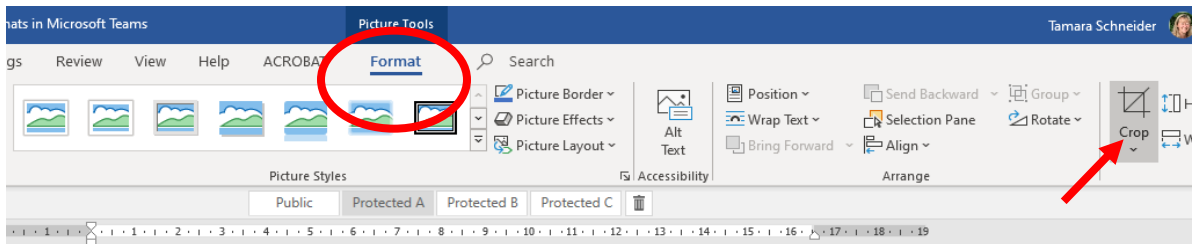


NOTE: It may be necessary to copy and paste multiple times to fully capture all content.

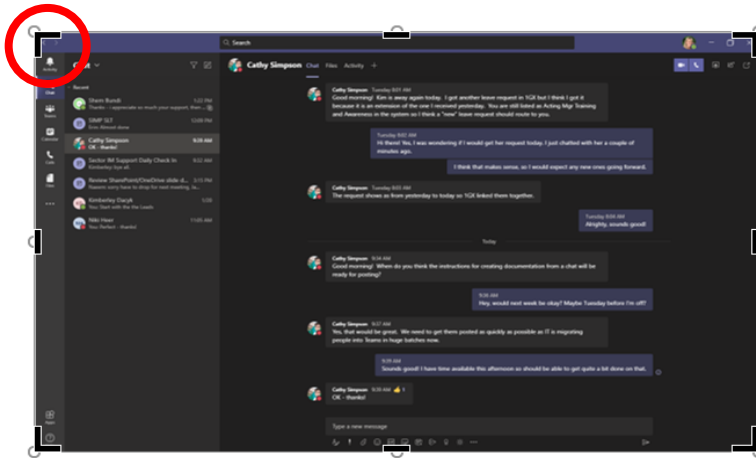
5. Add context to the document.
 - a. Provide a brief description of the Chat message. This may include the initial intent of the Chat message, how it evolved into a business decision and/or transaction, and why the decision was made.
 - e.g., On January 25, 2021, approval was given to proceed with Capital Plan 2021. The Project Charter is available at this link.
 - Add the date of the Chat message (i.e., when the business decision and/or transaction was made).

NOTE: Chat messages that are pasted into Microsoft Word are editable. DO NOT change any contents of the Chat messages. Including screenshots of the Chat message as it occurred is recommended.

6. Open the Chat message in Teams.
7. There are two methods to capture the screen
 - a. Use the Windows snipping tool that is available on all Windows machines.
 - Press the *Winkey*  +*Shift* + *S*.
 - As you can select exactly what you want on the screen, you will not have to crop your image using this method.
 - b. Press *Alt* and *Print Screen*.
 - At the bottom of the Word Document, press *CTRL* and *V* **OR** right-click and select "Paste".
 - To crop the screenshot, click on the image and then select "Format" from the "Picture Tools" tab at the top of the screen.
 - Click one of the black lines or corners located around the image and crop the image as needed.



show the message you are referring to click on the image and then select Format under the Picture Tools tab at the top of the screen.



8. Apply the appropriate Data and Information Security Classification label to the document.
9. Save the Word document in alignment with the [Electronic Document Naming Conventions Guideline](#) (e.g., Capital-Plan-Discussion-2021.docx) to an official information management system.

References and Supporting Resources

- [Data and Information Security Classification Standard](#)
- [Electronic Document Naming Conventions Guideline](#)
- [M365 SharePoint Site](#)
- [Management of Instant and Text Messages Directive](#)
- [Metadata – Core Content Standard](#)
- [Microsoft Teams FAQs](#)
- [Microsoft Teams Training](#)
- [Records Management Program Standard](#)