



# 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 and managing records within Teams, please review [SharePoint and Teams Best Practices](#). Please note that the technical processes described in this document are **not** controlled by the Records Management Program, and instead are subject to changes by either Microsoft or KCIT.

### Basic Teams Guidance:

- If a record exists, regardless of its retention period or format, it might be subject to disclosure or discovery. This document describes how to capture many of those elements using tools or methods that we are aware of. Some staff may have access to additional tools not covered in this document for exporting and saving records.
- The retention requirements for records in Teams is dependent upon the function of the record, not where it is retained or what format it is in.
- Teams chat conversations should only be used for transitory communications.
- Posts should also remain transitory in nature.
- 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?
- Delete transitory records as soon as they are no longer needed.
- File records with retention value into Content Manager when they are no longer active.

### Know where your Teams records are stored:

Records created and accessed through Teams sites are stored in various places and might not even be manageable through the Teams interface, but it is possible to **manage these different records**. If information needs to be exported or filed to Content Manager, these are available options:

Teams Record	Filing to Content Manager
<b>Entire Teams Site or Channel</b>	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.
<b>Call Histories</b>	Call histories are transitory in nature. But if their contents need to be retained, you can be copy and paste into a text file or take screenshots and save as image files, both of which can be filed to Content Manager.
<b>Deleted Items</b>	Items are automatically deleted/emptied from the Deleted Items folder after 90 days. They can be accessed by opening the Teams site in <b>SharePoint</b> and then navigating to the <b>Recycle Bin</b> . From there, you can restore individual items, permanently delete items, or Empty the folder.

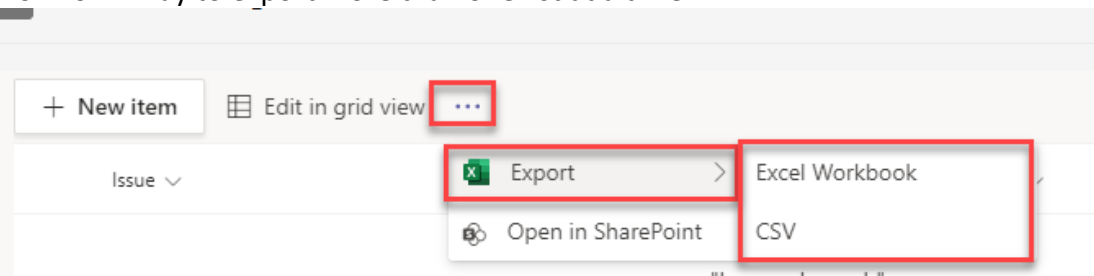


King County Records Management Program  
206-477-6889 – [records.management@kingcounty.gov](mailto:records.management@kingcounty.gov)  
[www.kingcounty.gov/recordsmanagement](http://www.kingcounty.gov/recordsmanagement)



# Records Management Guidance

## Teams – Detailed Guidance

<b>Documents (Files)</b>	<p>Unstructured data files (Word, PDF, JPEG, HTML, etc.) in Teams’ Files/Documents folder and subfolders can be filed to Content Manager.</p> <p>Follow <a href="#">existing guidance</a> to file these records to Content Manager after adding a shortcut to OneDrive, which makes them available to file from File Explorer.</p>
<b>Folder Columns (Additional Metadata)</b>	<p>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:</p> <ul style="list-style-type: none"> <li>• <b>Open the Teams site in SharePoint</b> and then navigate to <b>Documents</b>.</li> <li>• Click on <b>Export to Excel</b> and follow prompts to <b>save as an IQY file</b> in your file explorer.</li> <li>• Navigate to the IQY file, <b>double click to open it</b>, and select <b>Enable</b>.</li> <li>• In the Import Data window, leave defaults selected and click <b>OK</b>. The complete file list and folder structure of the SharePoint (Teams) site will be listed in an Excel spreadsheet. Click Save As to <b>save this as an Excel Spreadsheet</b> that can be filed to Content Manager.</li> </ul> <p>Note that if you separately filed the individual documents into Content Manager, it is <b>not</b> possible to have all metadata columns filed to Content Manager <i>along with</i> 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).</p> <p>The fields to use and display are based on the work and preferences of the groups that use these records.</p>
<b>Lists</b>	<p><i>Each</i> list must be <i>individually</i> accessed and exported to Excel or CSV (either in Teams or SharePoint view). Select <b>Export</b> then choose the <b>file type</b>. You may need to access this from an <b>ellipsis button</b>. 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.</p> 



King County Records Management Program  
 206-477-6889 – [records.management@kingcounty.gov](mailto:records.management@kingcounty.gov)  
[www.kingcounty.gov/recordsmanagement](http://www.kingcounty.gov/recordsmanagement)



# Records Management Guidance

## Teams – Detailed Guidance

<b>Meetings – Recordings</b>	<p>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 also be available in the chat history of the meeting.</p> <p>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).</p>
<b>Chats</b>	<p>Chats are not retained and are set to delete as soon as possible. Messages should disappear from view within three (3) 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:</p> <ol style="list-style-type: none"><li>1) take screenshots and save locally as image files and file to Content Manager</li><li>2) copy-and-paste into text files and save locally and then file to Content Manager</li></ol>
<b>Chats (Shared Documents)</b>	<p>Chats are not retained and set to delete as soon as possible, (see above). However, <i>documents</i> 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.</p>
<b>Posts (Conversations)</b>	<p>Users cannot 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</p> <ul style="list-style-type: none"><li>• To be notified about all your shown channels, select <b>All activity</b></li><li>• To be notified only when you are @mentioned or when you receive replies to your messages in channels, select <b>Mentions &amp; replies</b></li><li>• For the most control over your channel notifications, select <b>Custom</b></li></ul>





# Records Management Guidance

## Teams – Detailed Guidance

### Teams and channels

You will get desktop and activity notifications for:

#### All activity

New messages, reactions, and all mentions

#### Mentions & replies

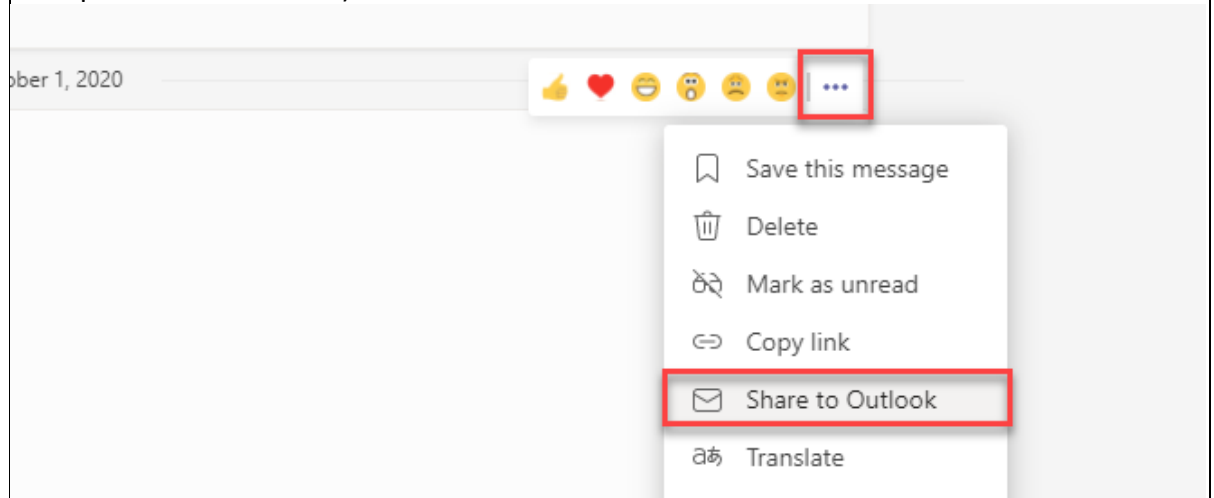
Personal mentions and replies to your messages

#### 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)



King County Records Management Program  
206-477-6889 – [records.management@kingcounty.gov](mailto:records.management@kingcounty.gov)  
[www.kingcounty.gov/recordsmanagement](http://www.kingcounty.gov/recordsmanagement)



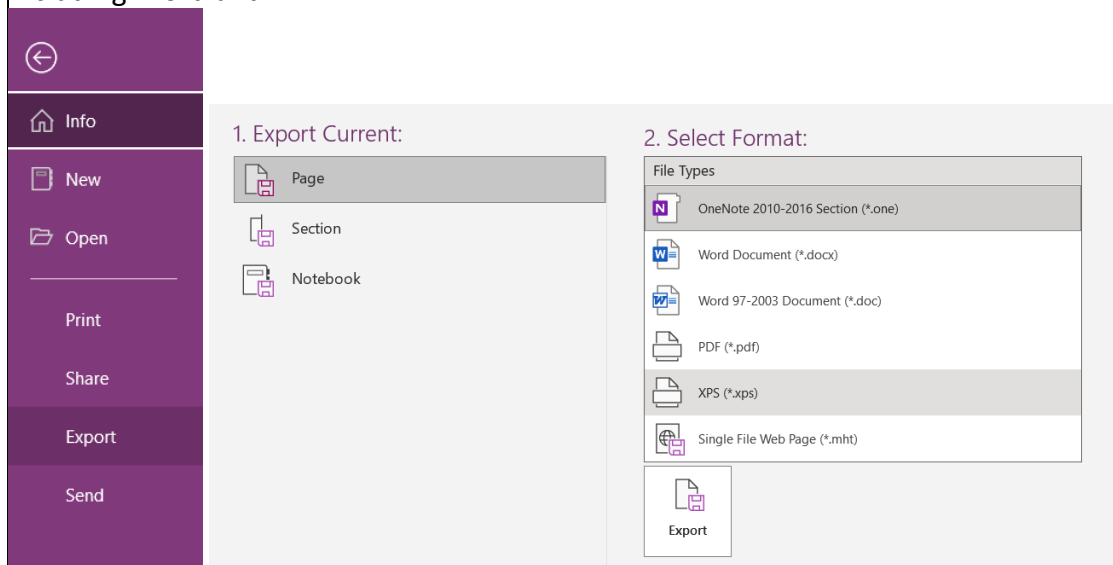
# Records Management Guidance

## Teams – Detailed Guidance

### OneNote

OneNote files (.one files) should only be used for transitory note taking; or used to take notes that will be formalized in another format – such as you would if you were taking handwritten notes for a meeting. Avoid using OneNote for any record that needs to be retained.

It is only possible to export from the Desktop version of OneNote (and not directly from Teams). This means that you might need to separately install the OneNote application on your PC. To export, open OneNote, and then go to File and select Export. From there, you can save up to the entire notebook in a format that can be filed to Content Manager, including Word and PDF.

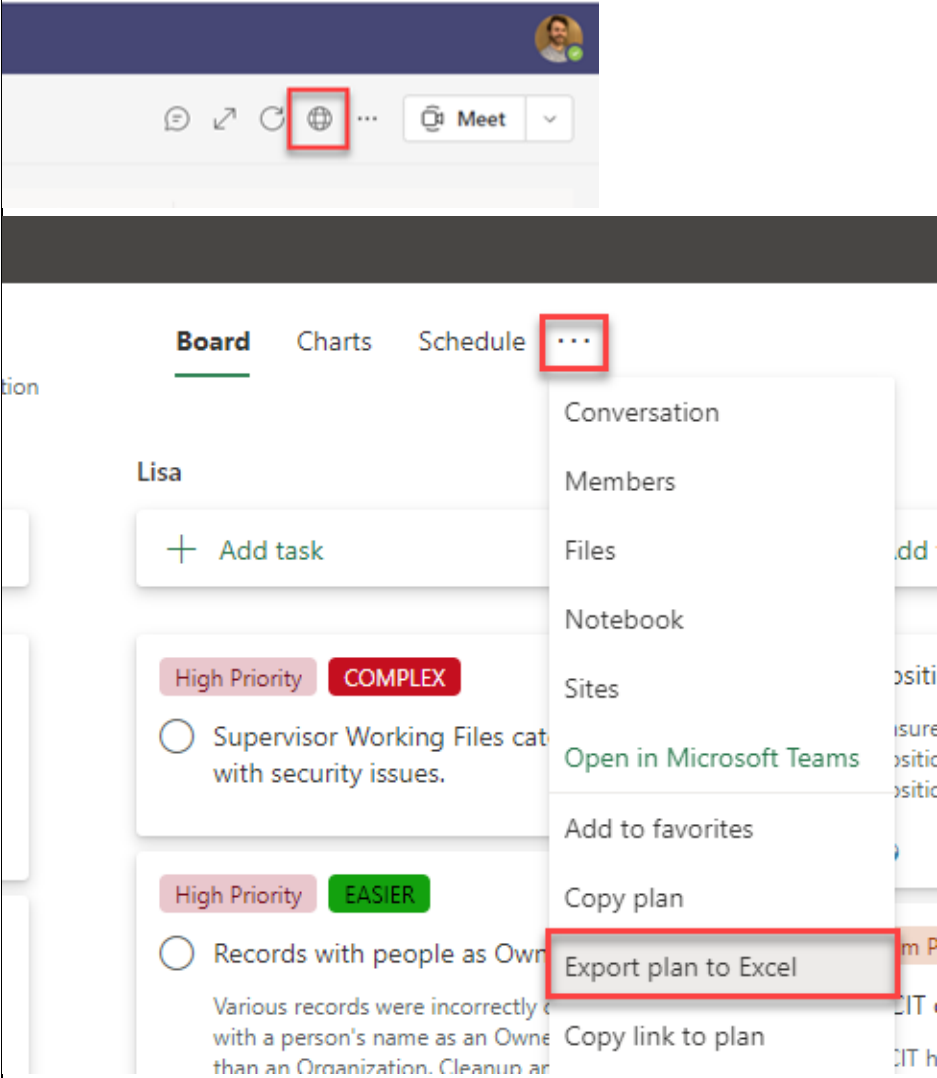


King County Records Management Program  
206-477-6889 – [records.management@kingcounty.gov](mailto:records.management@kingcounty.gov)  
[www.kingcounty.gov/recordsmanagement](http://www.kingcounty.gov/recordsmanagement)



# Records Management Guidance

## Teams – Detailed Guidance

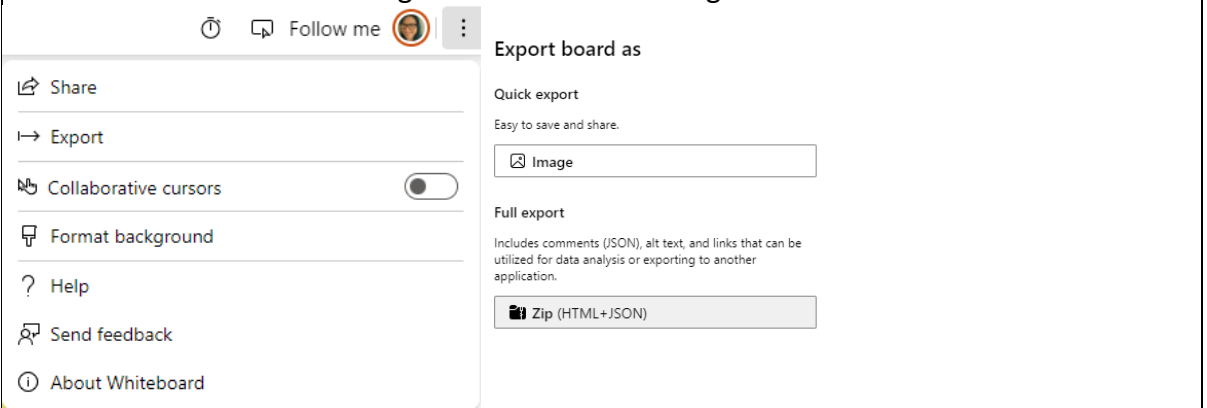
<p><b>Planner</b></p>	<p>From within Teams, click the <b>globe icon</b> (Go to Website) to open in Planner, then select <b>Export plan to Excel</b>. An Excel spreadsheet with all contents can then be filed to Content Manager from Windows File Explorer. To retain the look-and-feel of the planner, you must take screenshots and save (and file) them as image files.</p> 
<p><b>Wikis – Text</b></p>	<p>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 or PDF, all of which can be filed to Content Manager from Windows File Explorer.</p>





# Records Management Guidance

## Teams – Detailed Guidance

<b>Wikis – Images</b>	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.
<b>Whiteboard</b>	<p>Whiteboards can be exported as image or HTML+JSON files, but the text in images is not machine readable. Because of that, it is recommended to save them as HTML files. From the ellipses in the upper right of the whiteboard, go to Export and select your file format. These files can be saved as other record types for manageability and access. Zipped files must be extracted before being filed to Content Manager.</p>  <p>The screenshot shows the export options for a whiteboard. On the left is a navigation menu with options: Share, Export, Collaborative cursors (with a toggle switch), Format background, Help, Send feedback, and About Whiteboard. On the right, the 'Export board as' menu is open, showing two options: 'Image' under 'Quick export' (described as 'Easy to save and share.') and 'Zip (HTML+JSON)' under 'Full export' (described as 'Includes comments (JSON), alt text, and links that can be utilized for data analysis or exporting to another application.').</p>



King County Records Management Program  
 206-477-6889 – [records.management@kingcounty.gov](mailto:records.management@kingcounty.gov)  
[www.kingcounty.gov/recordsmanagement](http://www.kingcounty.gov/recordsmanagement)