MICROSOFT TEAMS
&
RECORDS MANAGEMENT

Microsoft Teams is great for collaboration. Sometimes it is not so simple to use from a records management standpoint. Fortunately, when you combine **IOT's Teams Lifecycles** with common **Business Use Cases** and add some basic **Records Management Guidance** you have a no cost, low tech, medium maintenance approach to managing records in Teams.

1   IOT TEAMS LIFECYCLES

Short Term Business Need - defined as centering on a specific project that has an identified lifecycle of 0 months to 6 months.

Long Term Business Need - defined as centering on a specific project that has an identified lifecycle of 6 months to 2 years.

Operational Need - defined as a tool for ongoing operational team collaboration with an indefinite lifecycle.

2   BUSINESS USE CASES

Communications Team - used to distribute operational info to staff. Does not contain original records.

Collaborative Team - used for projects and devoted to a specific topic. May have external guests.

Executive Team - used by executive teams to collaborate on policy, legal matters, or internal actions.

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RECORDS MANGEMENT GUIDANCE

TEAM TYPE: COMMUNICATIONS

AT A GLANCE
IOT Lifecycles: All
1. Default = conversations off for members.
2. Only use copies of original files.
3. Do regular file clean ups!

TIP
Turn conversations on for members in the General Channel so people can ask questions.

DEEP DIVE
1. Store original files outside of Teams to help ensure retrieval later. Network-attached (NAS) storage is a best practice.
2. Think of a Communications Team like social media - use it to share news and info, but not store or create original records.
3. Before deleting files from the Team, verify the originals exist outside of the Team and are retained appropriately.
4. Many records used in a Communications Team will fall under GRADM-4 for State agencies and GEN 10-04 for County/Local offices and have a three year retention period.

TEAM TYPE: COLLABORATIVE

DEEP DIVE
1. Consider files to be working drafts - once collaboration is over, move them outside of Teams to help ensure retrieval later.
2. Ensure any major decisions are documented outside of the Team - don't rely on the conversation feature as the only record.
3. Before deleting files from the Team, verify the originals exist outside of the Team and are retained appropriately.
4. Records used in a Collaborative Team may fall under agency or office specific retention schedules, tied to project-based work.

AT A GLANCE
IOT Lifecycles: Short Term or Long Term
1. Default = conversations on for members.
2. Limit files to copies or working drafts.
3. Do regular file clean ups!

TIP
Never use a Teams conversation as the sole record of any policy, legal, or similar decision!

TEAM TYPE: EXECUTIVE

AT A GLANCE
IOT Lifecycles: Operational or Long Term
1. Default = conversations off for members.
2. Limit files to copies or working drafts.
3. Do regular file clean ups!

TIP
Assume many files in an Executive Team may be scheduled for transfer to the Indiana Archives.

DEEP DIVE
1. Regularly move files outside of the Team to help ensure retrieval later.
2. Before deleting files from the Team, verify the originals exist outside of the Team and are retained appropriately.
3. Avoid using the conversation feature, but if you do use it, ensure that is not your sole record of any policy or legal decision.
4. Many records created and used in an Executive Team will fall under GRADM-3 for State agencies and GEN 10-03 for County/Local offices.