



Records Management Guideline

Collaboration Tools: when should I create a record?

Overview

Collaboration tools such as Zoom, MS Teams and MS OneDrive are for transitory use only. Do not use collaboration tools for compliance purposes or to make university decisions. Collaboration tools are subject to the University's automated retention schedules. Copy, summarize, or transcribe information that provide **evidence of a decision** or **work activity** from any collaboration tool to an appropriate recordkeeping system such as a structured MS Teams site, Team Share (shared network drive) or line-of-business application (e.g, WorkDay)

When should I create a record from collaboration tool?

Documents: Using a collaboration tool such as OneDrive can be both efficient and a convenient way to draft documents. OneDrive, however, is not an effective platform for recordkeeping. Access to records stored in OneDrive are tied to an individual's CWL credentials. Should they leave, access to these documents will be cut off. When drafting is complete, documents should be moved from the collaboration space to a **recordkeeping space**. Video Recordings: Video recordings created within Zoom or MS Teams are subject to an automated one-year retention schedule. If video recordings are needed for longer than one year (e.g. for **ongoing operational or teaching purposes**), the recording should be moved to a university-approved long-term storage location such as Kaltura. In addition, video recording of university meetings should always be transcribed.

Instant Messaging (Chat): Both Zoom and MS Teams provide instant messaging functionality. These systems are not considered recordkeeping systems. Records documenting business decisions must not be retained within these systems. Copy, summarize, or transcribe information that provide **evidence of a decision** or **work activity** from any collaboration tool to an appropriate recordkeeping system.

Automated Retention

*The Records Management Retention Schedules defines an automated 90 day retention for instant messaging (chat) and an automated one-year retention for video recordings in keeping with the intended transitory nature of these tools. As an end-user, if you are creating records needed for short-term purposes only, you do not need to do anything. The automated retention process will destroy information within collaboration systems behind the scenes.

Resources:

[Records Management Training](#)

[Records Management Manual](#)

[MS Teams Best Practices](#)

[One Drive Best Practices](#)

[Video Recording Best Practices](#)