

GOVERNMENT RECORDS SERVICE GUIDE

INSTANT AND TEXT MESSAGING

Instant messages along with texts or text messages are tools designed for communicating short, quick messages to others. This guide provides a brief overview of employees' responsibilities for using and managing instant messages and texts. This applies to work related messages sent within the government network or to external partners and the general public.

1. Recordkeeping Responsibilities



Employees need to create and keep complete and accurate records sufficient to document their decision-making and work activities. This applies to all types of government records, including instant messages and text messages that provide the best evidence of government business activities, transactions, policy or decisions. These records must be managed in accordance with corporate records management policy and standards. However, most instant messages or text exchanges/conversations will meet the definition of [transitory](#) records.

Transitory records are records of temporary usefulness that are needed only for a limited period of time in order to complete a routine action or prepare a final record. Examples of transitory communications are: “Is this morning’s meeting still on?”, “Do you have time to talk/meet?”; “Can you send me the address?” These types of messages do not document government business activities or decisions and do not need to be kept and filed in the office [recordkeeping system](#) (i.e., EDRMS TRIM, LAN directories/files, [ARCS](#) and [ORCS](#) paper files).

For additional guidance on handling these types of records, see the [Transitory Records Special Schedule \(102901\)](#) and our guide to *Managing Drafts and Working Materials*.

2. Managing the Messages:

Employees need to capture and file any messages that document government business activities (non-transitory).

Instant Messages:

Microsoft Lync 2010 within the BC Government provides security and privacy for instant messages (IMs) as it is attached to your government IDIR username and password. Instant messaging services require both parties to use the same proprietary software in order to exchange messages.

IMs may be saved using the conversation history folder within your Outlook mailbox. Where an IM within the conversation folder needs to be retained and shared with colleagues (see Section 1 for recordkeeping responsibilities) it can be easily moved into the office recordkeeping system.

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For government's implementation of Lync, the normal default setting is to **not save/record** messages, as the majority of IM exchanges will be transitory.

If you do need to keep an IM conversation:

- Click on the small gear button in the top right corner of the Lync window 
- Then click on the 'Personal' tab on the left hand menu. On this tab you will see an option to 'Save instant message conversation in my email Conversation History folder'. If you do not need it to record every message, then unclick this box (i.e., ensure it is not ticked). You can adjust this setting at any time.
- The message will only remain until you sign out. If you choose to record, the system will keep only the most recent 100 messages.

Note that even if you do not turn on the automatic recording, the person you are chatting with may choose to retain the conversation.

If you need to keep messages as evidence of a decision or work activity, you can also summarize the discussion in an email or another document, and file that in your office recordkeeping system. Alternatively, if you are an EDRMS TRIM user, you can file the instant message directly into TRIM.

Text Messages:

Text messages tend to be very short exchanges that generally create no written records beyond the history of recent texts located on the individual phone or mobile device. If a written record of the text needs to be retained, users can transcribe the information into an email or other document, or check to see if they are able to send the text message to their email account. The advantage of text messages is that unlike instant messenger systems, they don't require both sender and recipient to use the same software.

Check with your Ministry's Information Security Officer (MISO) to see if your ministry has any restrictions regarding use of these tools.

Additional Information

Contact your [Records Officer](#) or check out the rest of the [Records Management website](#)