Quick Reference - Instant Messaging
Transitioning a Chat Conversation to a Recordkeeping Format

This document contains step-by-step instructions on how to transition instant message content to a recordkeeping format from:

— Text Messaging (SMS, MMS or iMessage)
— BlackBerry Messenger (BBM)
— Skype for Business
— Microsoft Teams Chat

Notes:
— Text Messaging includes messages sent via Short Message Service (SMS), Multimedia Messaging Service (MMS) or iMessage
— Copying, Pasting or Forwarding content
   o may not retain the date, time and author of the information when text is copied
   o may not copy complete conversation (select all vs. select each chat bubble separately)
— An **ellipse (…)** or **tap and hold** are often used by applications to provide a menu of more choices

Taking a screen shot of the instant messaging conversation is also an option but should still be emailed, including typing the critical text from image.

Anthony and Erica are having an instant messaging conversation, via Text Message or BBM when they realize that their conversation has evolved and now contains information that should be captured as a record.

Text Messaging (SMS, MMS or iMessage)

Step 1:
Open the conversation and then tap and hold the chat bubble you wish to copy text from. You may have to select each chat bubble that you want to include if there is no Select All option.

Step 2:
Select **Copy**.

Step 3:
Open a New Email Message, **Tap and Hold** in the message body and select **Paste**.

Step 4:
Send the email to all those that participated in the Text Message instant messaging conversation

BlackBerry Messenger (BBM)

Step 1:
Open the Conversation and then select your Menu button [may be BlackBerry logo, ellipse (…) or similar choice]

Step 2:
Select **Copy Chat** or **Email Chat** (if selected email chat then skip to Step 4).

Step 3:
Open a New Email Message, **Tap and Hold** in the message body and select **Paste**.
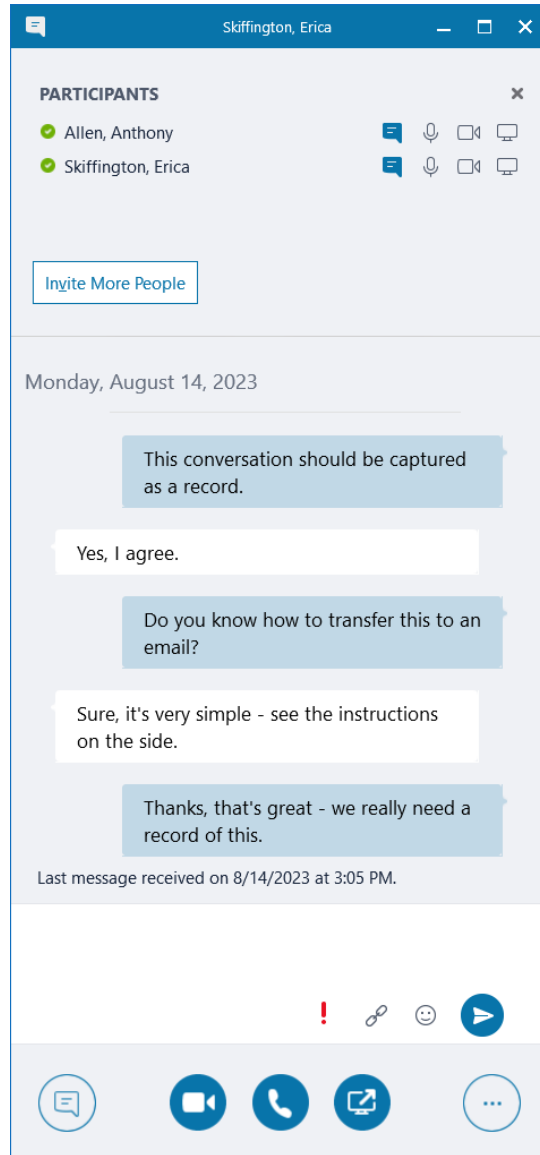
Step 4:
Send the email to all those that participated in the BBM instant messaging conversation.

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Transitioning a Chat Conversation to a Recordkeeping Format

Skype for Business

Anthony and Erica are having a conversation using Skype for Business when they realize that their conversation has evolved and contains information that should be captured as a record.

Step 1:

Right Click anywhere in conversation and choose **Select All**.

Step 2:

Right Click anywhere in conversation and choose **Copy**.
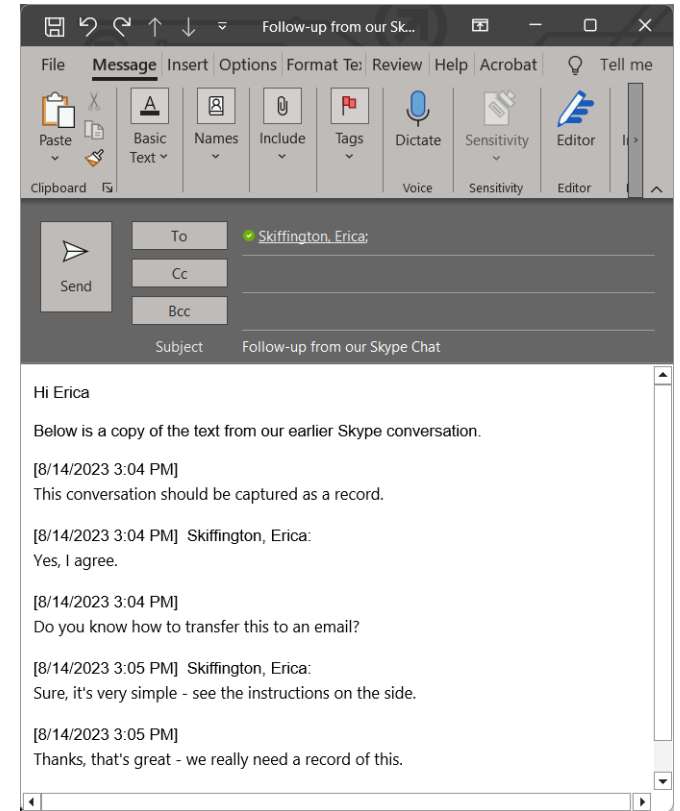
Step 3:

Open a New Email Message, **Right Click** in the message body and select **Paste** (Keep Source Formatting, Merge Formatting or Keep Text Only).

We recommend using Keep Text Only when pasting from Skype for Business.

Step 4:

Send the email to all those that participated in the Skype for Business instant messaging conversation.
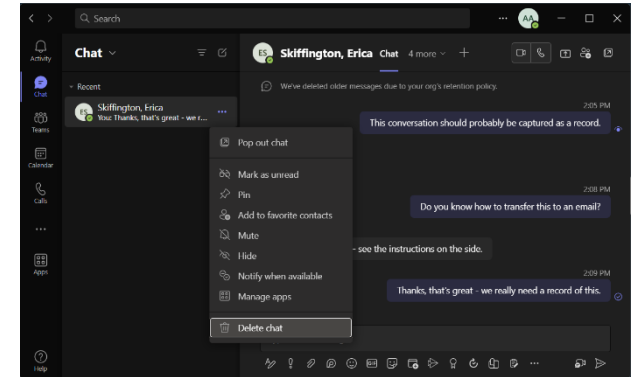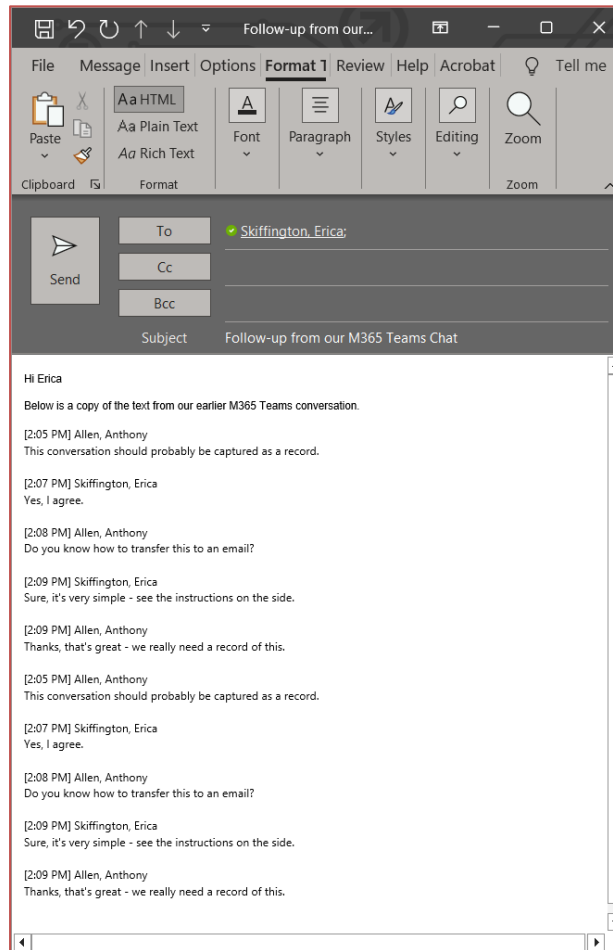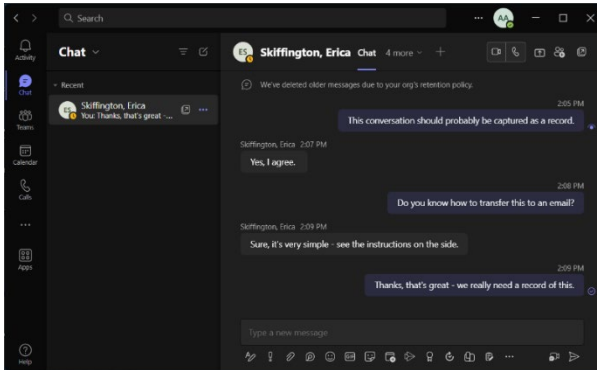
Microsoft Teams Chat

Anthony and Erica are having a business conversation when they realize that the conversation has evolved and contains information that should be captured as a record.

To Capture a Chat Conversation

Step 1:

Highlight the text to **Select All** of the chat conversation.

Step 2:

Right Click anywhere in conversation and choose Copy.

Step 3:

Open a New Email Message, **Right Click** in the message body and select **Paste** (Keep Source Formatting, Merge Formatting or Keep Text Only).

We recommend using Keep Text Only when pasting from Teams.

Step 4:

Send the email to all those that participated in the Teams Chat.

To Delete a Chat Conversation

Step 1:

Right Click on the name of person or group in the conversation or select the three dots to the right of the name for more options.

Step 2:

Select **Delete Chat** from the drop-down menu.

Important Notes:

1. In order for the chat conversation to be completed removed from **Microsoft Teams**, each person in the conversation will be required to delete the chat.
2. There is a difference in retention between a **Microsoft Teams 1:1 Chat** verses an ongoing chat in a **Microsoft Teams Channel** while collaborating with others. Teams 1:1 chats have a **24-hour retention** automatically; however, users can 'delete a chat' sooner than this timeframe. *It is important to note that the conversation will still exist in the other person's chat if they do not delete the conversation.*
3. Conversations occurring in a **Microsoft Teams Channel** when collaborating will have a retention of **30 days**.