Washington Records and Information Managers (WARIM) Forum Notes
July 16, 2020

Table of Contents

Copies of chat messages have been pasted into these notes (look for italic font).

Forum Notes

Message from Carissa Bourdon, Chair - WARIM is a place for learning, collaborating, and community, as well as a place for resources.
If you have topics you would like to discuss or learn more, send email to Carissa or June.

Discussion – Teams chats

Transitory records
- Transitory retention value is linked to the business interaction, not the technology being used.
- Some software/platforms do not have sophisticated rules so it is hard to manage the records inside.
- Rules need to manage the behavior of users.

Question – How do you get staff to understand that business inside Teams or other chat platforms is often transitory?
Answer – Suggestions -
- Policy in place that chats are to be used only for transitory records.
- If there is a business need to keep the record longer, send email to yourself to be retained in vault.
- Draft meeting notes after the meeting and saved based on content.
- Set up the rule for destroying records considered transitory.
- Pre-approved chats that have business value for with appropriate retention.

Q – What is a good definition of transitory?
A - Transitory is often defined as records with zero value or have no records retention. However, the correct disposition is no longer needed for agency business.

Q - Is there a term that could be used for records that has less value than transitory?
There is a misunderstanding with the word "transitory". Many people use that word to describe zero value or zero retention, but isn't transitory to be retained until no longer required for
Not an elegant phrase...but content with specific retention value?

Dept of Licensing is working on a policy that will cover all virtual meeting spaces, and chat systems. They are adding info to their new Virtual Meeting space policy about recording meetings.
They solicited the agency for the reasons they "need" to record. For example, public hearings.
They made a list of those that are acceptable, and if there are other folks who "need" to record, they must go through an approval process first. They have offered to share the policy with the forum after its finalized.

The Washington Records and Information Managers (WARIM) Forum serves to unite fellow Records Officers and strengthen records management throughout the state of Washington. Our goals are to ensure continuity, cooperation, and consistency of records management standards, as well as support and champion fellow Records Officers.

E-Discovery
- Public Records Act seems counterintuitive to delete records in chats.
- Recorded video vs chats as two separate issues.
- Recording as public records and needs to be retained appropriately.
- Save records outside of platform if it has an auto-delete.
- Issues with searches in chats is it will show all of the chats of one person in one document, another chat in another document, etc., without having the conservations in an easy to read format.

Suggested next steps –
- Talk to your Chief Risk Officer if your agency's chats (records) needs to be saved.
- ROs need to understand the functionality of a system as well understanding retention.
- Government has hard boundaries of what we can do or not do with records. We can not do records at work the same way as home. Education needed.
- Encourage everyone to look at the risk and talk to your AGO and leadership about these risks.
- Training on appropriate use of chats.
- Single tenant wants to use Teams for main business instead of transitory chats.
- Review the advice sheets that Scott Sackett, SOS showed us (links are below).

Q - How long do chat/IM records need to be kept?
A - Secretary of State have provided two advice sheets –
      How Long Do Chat/Instant Messaging Records Need to Be Kept?
      Strategies for Managing Chat/Instant Messaging Retention

Q – With Vault, we were able to set our own agency retention. Do we have this option with Teams?
A – No, because of product limitations on what the state has purchased for state-wide use.

How can we get Microsoft to allow users to delete the Teams Chat? My fear lies in no retention, and no ability for anyone *to delete the chat history.*

If the PRA is intended to guide our decisions, and the intent of the PRA is to "shine a light" on government business, the idea of implementing auto-delete policies on data seems counter to the intent of the PRA.

This is what makes me nervous about auto-delete policies on communication tools in our environment. It's true, but you know there are units like IS who want to use Teams for all of their work - beyond transitory or less than transitory.

The Office Drama stickers in Teams Chat TERRIFY me! If you haven't seen them, they are comics with blank speech bubbles that you can put anything in.

Q - Can the stickers "option" be disabled?
A – Unknown at this time.

Resources from chat
https://www.jdsupra.com/legalnews/how-ephemeral-messaging-can-affect-55581/
https://respond.io/blog/top-10-instant-messengers-for-business/
http://mrsc.org/Home/Explore-Topics/Personnel/Local-Rules-and-Policies/Text-Messaging-Policies.aspx
http://mrsc.org/Home/Explore-Topics/Personnel/Local-Rules-and-Policies/Internet-Email-and-Computer-Usage-Policies.aspx

Please send your sample polices on transitory, IM, chats, etc., to Carissa or June. They will be posted on "Examples of Agency Internal Training Materials".

Subcommittee – Office 365
Carissa will be sending out the charter to the subcommittee members for their review. Next step will be to bring the document to WARIM for a vote.

WATech has asked WARIM Office 365 Subcommittee to make decision on state-wide Team chats (not team channels). WARIM is in the process of gathering requirements before making decisions.

Anything good for the order/Assistance from group

Q - What are you using to capture text messages?
A - We use Smarsh for capturing and producing text messages for records requests.

Q – What did WATech do for the accidentally chat records removal?
A – Info on status

Q – Department of Licensing has set up a dedicated workshop (virtual) on M365 Compliance Center Training. Would your agency like to attend?
A - See email at end of notes for additional details.

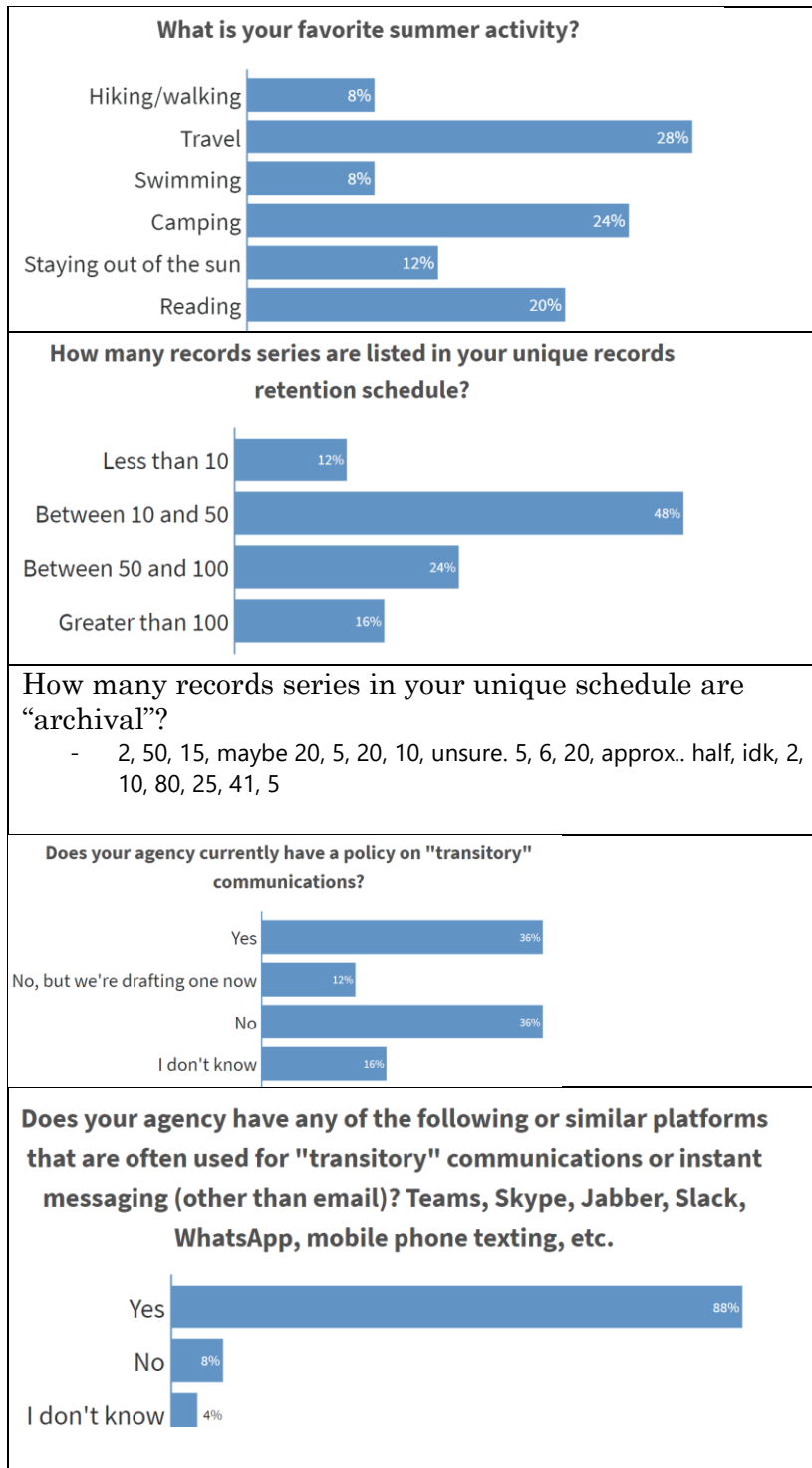Q – Where are the past WARIM meeting notes?
A - WARIM meeting notes

Future meetings:

Date	Day	Time
September 8, 2020	Tuesday	9 AM to 12 PM
November 9, 2020	Tuesday	9 AM to 12 PM

WARIM Poll Activity
(formal survey to follow)

Poll was taken during forum and here are the results –

What is your favorite summer activity?

Activity	Percentage
Hiking/walking	8%
Travel	28%
Swimming	8%
Camping	24%
Staying out of the sun	12%
Reading	20%

How many records series are listed in your unique records retention schedule?

	Percentage
Less than 10	12%
Between 10 and 50	48%
Between 50 and 100	24%
Greater than 100	16%

How many records series in your unique schedule are "archival"?

- 2, 50, 15, maybe 20, 5, 20, 10, unsure. 5, 6, 20, approx.. half, idk, 2, 10, 80, 25, 41, 5

Does your agency currently have a policy on "transitory" communications?

	Percentage
Yes	36%
No, but we're drafting one now	12%
No	36%
I don't know	16%

Does your agency have any of the following or similar platforms that are often used for "transitory" communications or instant messaging (other than email)? Teams, Skype, Jabber, Slack, WhatsApp, mobile phone texting, etc.

	Percentage
Yes	88%
No	8%
I don't know	4%

Transitory and Text/Skype/Chat Cheat Sheet

Text Messages and Public Records – Do We Keep These?

It's hard to keep up with our rapidly changing work world and we use email, messaging and collaboration tools such as Skype, Teams and Zoom to do our daily work more than ever. Please remember that those conversations and files we share about our agency work are public records and must be kept according to retention schedules and managed. Yes, even if we create or 'say' them in Text Messages, Skype or Chat.

Many have heard that those messages are Transitory and we can throw them away. That's true if they do not contain agency business. Otherwise, we must keep them. It's all about what we say, not what device we use to say it.

So what's the difference between "Transitory" (throw it away) and "Agency Business" (keep it) in Text/Chat/Skype?

Transitory Examples (not required to keep)	Agency Business Examples (keep)
Transitory – it does not relate to the transaction of agency's public business and can be deleted.	**Agency Business** – it does relate to the transaction of the agency's public business. These should be handled via email or 'face to face' discussions if possible.
I'll be late to the meeting.	I'll be late, can you please tell Tom that the office upgrades won't be on this year's budget
Could you please call me?	We want to switch to 100% remote exams. What do you think?
I just sent you an email.	Can we review those violations for XYZ Mortgage?
Are you in the office?	What do you think Charlie's position on this bill is?
Nice to see you last week.	When we met on Thursday you said "_____"
Can you call and help me with something?	I'm having trouble accessing the EFD system, how do I log in again?
We're out of paper clips.	Office Depot has a best price on paper clips. I'll send you the link so you can buy some for us.
Can you cover me in today's meeting?	We need to meet with all the stake holders about this issue.
I emailed you a draft. Please take a look.	..." ___ " This is the language for the letter.

From: Jackson, Megan (DOL) <MJackson@DOL.WA.GOV>
Sent: Tuesday, July 28, 2020 1:20 PM
Subject: M365 Compliance Center Training - DOL Hosted

Good afternoon colleagues,

I am writing to let everyone know that we don't have any seats for the M365 Compliance Center Training. However, the good news is that DOL is working directly with Microsoft and WA Tech to scope and create a training session that will benefit WA agencies working under WA Tech's shared tenant. Apparently the class they were offering wasn't as beneficial since we have the shared government tenant. Fingers crossed that we can help create a new training that will help us all!

I included everyone on this email that had reached out to me with interest in the class. As you can see there is a lot of interest, and many of the people receiving this had multiple people from their agency that wanted to attend.

I would suggest that you get in touch with WA Tech and see if they can help coordinate a training that you can all attend together, and split the cost.

Our training is scheduled for Aug 13, and I will be sure to share at the following WARIM forum how we think it went.

Thank you, and let me know if you have any questions!

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Pronouns: She, her, hers