

Capturing records of meetings, conversations, text and instant messages

Meetings, conversations, text and instant messages are accepted mediums for conducting business, and public authorities may need to deliberately create and capture records of the business decisions and transactions made during these types of communications.

This brief does not deal with the handling of correspondence such as letters, faxes and memos that should be routinely filed as part of routine recordkeeping practice. Advice on keeping these types of records is provided in the Public Records Briefs, *What is a Public Record?* and *Identifying a Public Record in the Electronic Environment*, which are available from Queensland State Archives' website.

When do records need to be captured?

Public authorities need to capture records when they make business decisions or transactions including those made during a meeting, conversation or text or instant message. Records need to document:

- the transactions of business activities;
- the date and time of the transactions;
- the decisions or recommendations;
- the rationale for decisions or recommendations; and
- the people involved.

Capturing records of meetings

While formal committees follow minute-taking and approval processes, public authorities should also create and keep records of significant informal meetings where business decisions are made or business activities undertaken. Public authorities can create records of meetings by:

- assigning responsibility for preparing minutes or a summary of the meeting;
- ensuring major decisions and dissent are recorded;
- circulating the draft minutes or summary to the people involved, to ensure that it accurately reflects the discussion at the meeting; and
- placing the final, approved minutes of meetings on an appropriate file within the recordkeeping system.

Conversations

A quick face-to-face meeting or telephone call may lead to giving significant advice, permission for an activity, making a decision or reaching a commitment or agreement. Create records of conversations by:

- making a file note that includes details of the people involved, the date and time, the topics discussed and clearly listing any actions or decisions made or authorised;
- ensuring that the file note is captured into the recordkeeping system; and
- making and filing transcriptions of voice mail messages.

Short Messaging Service (SMS or text messages)

The Short Messaging Service (SMS) available on mobile communications systems allows text messages to be sent between mobile telephones, or between internet gateways and mobile phones. If text messages are used to conduct some of a public authority's business, agencies can create public records by:

- making and filing a record of any relevant text messages with details such as the date and time the message was sent or received, the intended recipient or the sender of the message and the contents of the message.

Instant Messaging Technologies

Instant messaging technologies allow the real-time exchange of messages between users over networks such as the Internet. Instant messaging is most commonly used for text-based communication, but may also incorporate video and web conferencing services, and voice over IP (routing of voice conversations over the Internet). Public authorities can create records of instant message conversations by:

- ensuring that recordkeeping requirements are considered when policies guiding the use of instant messaging technologies are introduced or revised;
- if possible, incorporating electronic files of instant message conversations relating to business decisions or transactions into a recordkeeping system, or
- ensuring that a file note is created containing details such as the date and time, the participants, the subject discussed and the decisions made or transactions that occurred.

Related Public Records Briefs and other publications

The Briefs, [What is a Public Record?](#) and [Identifying a public record in the electronic environment](#) provide further advice on what is considered to be a public record. The Brief, [Who is responsible for public records?](#) outlines the recordkeeping responsibilities of public authority employees, CEOs, managers and recordkeeping personnel, as well as QSA's role and the legislative and regulatory environment relating to recordkeeping.

Specific advice regarding email records management can be found in Queensland State Archives' policy, *Managing Emails that are Public Records*, and in the GOLD training module, [Managing Electronic Messages as Records](#).

Specific advice regarding the management of online resources (including web sites) is provided in the policy and guideline, *Managing Records of Online Resources and Services*.

The publications *Managing Emails that are Public Records* and *Managing Records of Online Resources and Services* are available from Queensland State Archives' website: <http://www.archives.qld.gov.au>.

For more detailed guidance on the management of public records visit the Queensland State Archives' website at <http://www.archives.qld.gov.au>, or contact us on:

Telephone: (07) 3131 7777

Email: info@archives.qld.gov.au