

Social Media Recordkeeping Requirements and Strategy

Purpose

This Records Advice has been prepared to provide ACT Government employees with guidelines for managing records generated through official ACT Government social media platforms. The intention is to educate ACT Government employees on the importance of creating and maintaining social media recordkeeping strategies compatible with legislative requirements.

This Records Advice should be read in conjunction with the Records Advice [Social media capture content and scenarios](#) and the ACT government's Social Media Policy.

ACT Government and social media

Social Media are online services, tools and applications used for publishing, sharing, and discussing information. They can include forums, blogs, wikis, mobile apps, social networking websites and any other websites that allow individual users to upload, comment on, and share content. > *direct from* [CMTEDD Social Media policy](#)

The ACT Government uses many types of social media platforms and applications including, but not limited to:

- **Micro-blogging sites** – (E.g., X (formerly Twitter), Yammer).
- **Social and professional networking sites** (E.g., Facebook, LinkedIn).
- **Video and photo sharing websites** – (E.g., YouTube, Flickr, Pinterest).
- **Blogs** – online diaries for pictures and updates (E.g., Instagram, Tumblr, Blogger, Wordpress).
- **Wikis** – libraries of collaborative documents that groups of people can edit (E.g., Wikipedia); and
- **Forums and discussion boards** – (E.g., Google Groups, Ning, Whirlpool).

Roles and responsibilities

Directorates are responsible for the proper management of their own records, including those created through social media platforms.

The business unit generating social media content is responsible for developing a social media strategy document that satisfies recordkeeping requirements in line with the principles set out in the [Territory Records \(Records and Information Governance\) Standard 2022 \(No 1\)](#) in addition to the business needs.+

Managers and Supervisors are responsible for ensuring the social media strategy is implemented in their area of responsibility, and the records produced as a result of social media usage are managed appropriately in accordance with the [Territory Records \(Records and Information Governance\) Standard 2022 \(No 1\)](#).

Personnel must be aware of their individual responsibilities in relation to the social media strategy and the documented procedures designed to support the record management of captured content.

What to capture

Social media records must be captured in accordance with the same record keeping regulations of all other ACT Government records. All data, relevant to the context of the record, must be captured to maintain the completeness and integrity of the record. This includes deleted and edited posts, comments, associated media and metadata.

Recordkeeping strategy

Agencies are encouraged to develop a social media recordkeeping strategy, with input from both the business area and records management team before they begin using a social media platform.

The recordkeeping requirements of each platform, and the business function it is being used for, should be considered individually, and the results of that consideration documented and approved.

It is important to consider that a single strategy may not be suitable for all social media platforms. Most social media platforms are owned by a third-party provider and are subject to regular change in relation to both functionality and security.

Once approved, the strategy should be promulgated to appropriate staff and reviewed annually by a senior officer to ensure any changes in the engagement, or when updates to the platform are known and can be acted upon – including changing the social media's data retention approach where appropriate.

Strategy Analysis

A social media recordkeeping strategy should:

- 1. Assign** responsibility for monitoring the social media platform in an official capacity, with documented procedures that.
 - Determine the data and content to be captured for recordkeeping purposes.
 - monitor, capture and manage the social media platform and the records produced as a result of its use.
 - Assign the responsibility for conducting social media recordkeeping procedures.
 - Advise the frequency for conducting procedures (*daily, weekly, monthly, etc*).
 - Stipulate an escalation process to manage potential unfavourable scenarios and the records generated as a result.
- 2. Mitigate** risks associated with the engagement (frequency and topics) expected on the platform.
 - Design processes to review and determine the potential or required need for content capture before upload to platform occurs.

- Identify potential risks to the business through the use of social media (e.g., consequences of not capturing important records of topics of interest or debate.)
 - Identify potential and worst-case scenarios of generated content (e.g., unfavourable responses, accidental or malicious deletion, or vandalism of content) and design procedures to capture records for the purpose of accountability.
 - Identify and consider the risks posed by the platform such as, short retention periods for data by a platform or the complexity of records capture.
 - Advise mitigating actions and plan for appropriate responses to those scenarios.
- 3. Appraise** the value of the created records and link the records to a relevant business classification scheme.
- Identify potential records created as a result of generated content.
 - Understand the business value of the social media content and determine the retention of the record in accordance with the Territory Records Act 2002.
 - Determine the *Function and Activity* (refer to the [Business Classification Scheme](#) and the disposal class(es) (refer to [Records Disposal Schedules](#)) relevant to the information, so the records are managed for as long as required.

For further advice relating to the appraisal of records, contact your [Directorate's Records Manager](#).

- 4. Determine** the appropriate recordkeeping approach suited to the social media platform.

Recordkeeping Approach

The above analysis (responsibility, risk, and records appraisal) will determine which recordkeeping approach is the most appropriate to the social media instance.

[State Records NSW](#) has developed eight social media recordkeeping approaches that are endorsed by the Territory Records Office. The suitability and risks associated with each approach, is briefly explained in the table below:

Approach	Suitability	Risks
<p>Leave the information on platform: <i>Keep the information in the social media application, take no action.</i></p>	<ul style="list-style-type: none"> Generated content has no value to the business for recordkeeping purposes. Business areas will not require ongoing access to this information. All staff who require access to the information, can gain access to it through the social media system. Approach would need to be reviewed against the agency <i>Social Media Acceptable Usage Policy</i>. 	<ul style="list-style-type: none"> Does not guarantee ongoing accessibility of business information if links expire or platform policy or functionality changes. Long-term retention of data may not be available. Will be unlikely to capture deleted or edited data. Needs to be deployed following specific risk-based decisions
<p>Low level management: <i>Capture regularly scheduled downloads or exports.</i></p>	<ul style="list-style-type: none"> Some generated content may have short term value to the business. Business will require minimal ongoing access to generated information. Generalised capture of generated content required on a scheduled basis for record keeping purposes. 	<ul style="list-style-type: none"> Requires a responsible person to conduct scheduled downloads of content and capture into an appropriate storage location. Strategy creates data dumps in formats which may require additional processing to be reused for other business purposes. May create duplicate records or miss deleted or edited posts in a capture.
<p>Monitoring-based management: <i>Use a monitoring application to capture information about engagement and reactions.</i></p>	<ul style="list-style-type: none"> Some generated content may have short- or long-term value to the business. Business areas will require minimal ongoing access to this information. Basic capture of record data, reporting or engagement required on a scheduled basis, for record keeping purposes. 	<ul style="list-style-type: none"> May miss deleted or edited posts in a capture. The monitoring application or tool may not provide a full data export. Strategy creates data dumps in formats which may require additional processing to be reused for other business purposes. Requires an active understanding of social media platforms, awareness of the generated content and the record keeping requirements governing the action.
<p>Needs-based management: <i>Take action only when specific issues arise.</i></p>	<ul style="list-style-type: none"> Minimal risk social media content, containing irregular value to the business. Ongoing access required for content generated as a result of a contentious or noteworthy issue or event. Discretionary capture of generated content required for specified topics of noteworthy issues or events for record keeping purposes. 	<ul style="list-style-type: none"> Requires a responsible person to conduct downloads of content and capture into an appropriate storage location. Requires an active understanding of social media platforms, awareness of the generated content and the record keeping requirements governing the action. Strategy creates data dumps in formats which may require additional processing to be reused for other business purposes. May miss deleted or edited posts in a capture.

<p>Reporting-based management: Produce a document to report on identified use metrics.</p>	<ul style="list-style-type: none"> • Specific generated content contains short- or long-term value to the business. • Ongoing access of specific generated content required for business or strategic purposes. <i>E.g., reporting, statistics, performance, etc</i> • Dedicated capture of data or content on a scheduled basis for record keeping purposes 	<ul style="list-style-type: none"> • Requires a responsible person to conduct downloads of content and capture into an appropriate storage location. • Strategy should be reassessed regularly to ensure the strategy continues to meet business needs and record keeping requirements. • Reports only provide general metrics and do not capture the content of the engagement.
<p>Reuse-based management: Export the data so it can be reused for other purposes.</p>	<ul style="list-style-type: none"> • High generation of varying content containing short- or long-term value to the business. • On-going access to general content required for business or strategic purposes. • Content captured as required to support, provide consistent advice, advertise or reference etc. • Potential for cost, time, and performance efficiencies through the reuse of generated content. 	<ul style="list-style-type: none"> • Must be supported by all relevant staff to conduct downloads of content and capture to an appropriate location. • Design of strategy needs to meet business expectations to effectively support or improve business processes. • Does not provide evidential or accountability. • Strategy should be reassessed regularly to ensure the strategy continues to meet business needs and record keeping requirements
<p>Accountability-based management: Use an application to monitor and record activity.</p>	<ul style="list-style-type: none"> • High generation of varying content containing short- or long-term value to the business. • On-going access to general content required for business or strategic purposes. • Organisation has a high-risk profile and needs to be able to fully account for its public statements and operations. • Organisation has high risk business operations, including business and community accountability as part of the engagement. 	<ul style="list-style-type: none"> • Applications or tools to facilitate this approach can be expensive. • Design of strategy requires good configuration and management of software to ensure effective recordkeeping in suitable formats. • Strategy will capture all transactional information including unnecessary data and may be too extensive for the business requirements.
<p>Broadcast-based management: Use a broadcasting system to manage the records.</p>	<ul style="list-style-type: none"> • High generation of identical or similar content to multiple social media platforms. • High generation of content containing short value to the business. • Business areas will require minimal ongoing access to this information. 	<ul style="list-style-type: none"> • Requires responsible staff to have a strategic understanding of information needs. • May require export capacity to ensure ongoing accessibility of long-term value business information. • Strategy should be reassessed regularly to ensure the strategy continues to meet business needs and record keeping requirements.

Capture Methods

A variety of software, tools and services are available to capture social media records. Appropriate methods of capture will be determined by the business needs, social media strategy and recordkeeping approach. The table below provides a basic evaluation of some available options.

Native platform tools		
<i>Exported or backed up manually from platform using activity logs, Application programming interfaces (APIs), print screen, meeting recordings or transcripts, etc</i>		
Pros	Cons	Approach Suitability
Zero cost, available online No software integration required Can specify content for archiving	May not capture attachments Does not capture deleted content Format of capture may not be suitable for archiving. Does not preserve metadata Export needs to be manually performed Time consuming to manage Requires scheduling Can result in duplication	Leave on platform Low-Level information management Needs-based management Reuse -based management

Social media management software		
<i>Google Analytics, Azure archive storage, Intradyn, etc</i>		
Pros	Cons	Approach Suitability
Low to Moderate Cost Preserves Metadata. <i>i.e., time stamps and creator</i> Can capture attachments Minimal technical knowledge required Ease of use to search for archived records	May not be able to specify content for export Does not capture deleted content Format of capture may not be suitable May require integration into agency software May not be compatible with all social media platforms in use. Can result in duplication Export needs to be manually performed	Reuse-based management Broadcast-based management Monitoring-based management Leave on platform Low-Level information management Needs-based management

Paid Services		
<i>Brolly, Archive Social, HootSuite, Socialware, Backupify, etc</i>		
Pros	Cons	Approach Suitability
Easy to use. No technical knowledge required	Expensive	Reporting-based Information Management
Captures deleted content	Some services only offer Cloud storage	Accountability-based management
Capture content from different platforms simultaneously	Limited to services with Australian based storage option.	Leave on platform
No system integration required	If membership lapses, preservation will cease.	Low-Level information management
Preserves Metadata. <i>i.e., time stamps and creator</i>		Monitoring-based management
Analytics tools built in.		Needs-based management
Captures attachments.		Reuse-based management
Captured records comply with Australian record keeping standards		Broadcast-based management

For more information

See [Social media capture content and scenarios](#).

To view the social media policy for the ACT government see [Social Media Policy](#).

The complete list of Records Advices is on the internet at <http://www.territoryrecords.act.gov.au/recordsadvice>

More detailed information on the ACT Government records management regime may be found in the Territory Records Office Standards <http://www.territoryrecords.act.gov.au/standards> and the related Territory Records Office Guidelines <http://www.territoryrecords.act.gov.au/guidelines>

This Records Advice was informed by [State Records NSW](#), [Public Record Office Victoria](#), [Queensland State Archives](#) and [National Archives of Australia](#).



The *Social Media Recordkeeping Requirements and Strategy* Records Advice is licensed under [Creative Commons – Attribution 4.0 International – CC BY 4.0](#). You are free to re-use the work under that licence with attribution.

Please give attribution to: © Australian Capital Territory, 2023

The licence does not apply to the ACT Coat of Arms, the ACT Government logo and branding, images, artwork, photographs, or any material protected by trademark.

[CONTACT US](#)

Territory Records Office | www.territoryrecords.act.gov.au | TRO@act.gov.au