

## Social media and recordkeeping

Social media applications are powerful tools for creating and sharing information but they have limited capacities and specific risks in relation to information retention.

Therefore, if your organisation is using social media applications like:

- Twitter
- Facebook
- You Tube
- blogs
- wikis
- collaborative tools

to perform some of its business operations, you may need to develop recordkeeping strategies to ensure that key business information generated in these applications is maintained.

### Social media applications are legitimate business systems

Legitimate, high level business is rapidly moving to the social media environment. Because of their reach, flexibility and capacity for direct engagement, social media applications are starting to replace long-standing business applications like email or project management systems, formal business tools such as intranets, manuals, procedures and newsletters and official processes like face-to-face meetings or formal consultation and engagement procedures.

Previously, recordkeeping rules and requirements supported these applications, tools and processes and ensured that business information would be available to support operations now and into the future.

However, in the transition to the social media environment, these recordkeeping rules and requirements are often not redefined. Business is moving to social environments but limited planning is supporting this transition. As a result, information required to support business operations may not be created and maintained.

All digital information is vulnerable to software change and degradation, but social media based information is more vulnerable than most because it is not managed internally, is located in proprietary cloud-based platforms and is owned by external third parties.

Therefore, if you need ongoing access to the information produced in social media applications, you will need to proactively plan for its creation and maintenance.

### But social media applications are not recordkeeping systems

As they are external, web-based, third-party hosted business systems, social media applications give you no guarantees about the retention and management of your business information located within them. Information in social media applications can be deleted or made inaccessible, or the social media application itself could disappear leaving you with little recourse and few ways of retrieving your business information.

For short term, low value transactions the risks may be minimal. However, if you wish to base business decisions on social media engagement strategies, are providing advice to clients via social media, use social media to manage project consultation and collaboration, use social media as a knowledge hub for corporate decision making, or have responsibilities for key corporate communication disseminated using social media, then you may need to build recordkeeping into your social media strategies. If you don't, key business information needed to support significant and ongoing corporate business could easily be lost.

### What records do you need from social media?

The types of records you need will depend on the types of business you are performing. When considering recordkeeping, think about the business you are performing using social

media applications and then consider the evidence and information you will need to account for actions or decisions, plan for future operations, evaluate effectiveness, manage client relationships, support projects or integrate engagement into corporate strategy and objectives. It is likely that there will not be a one-size-fits-all approach to social media recordkeeping, but that your recordkeeping strategy will be tailored to suit the needs of your specific business operations.

For example, a local government authority sends out emergency tweets updating residents on an immediate fire hazard. Its recordkeeping strategy is to download all these tweets with their date and time stamps and capture them into a corporate recordkeeping system as it is likely that the authority will have to account for its management of this emergency.

Tweets promoting new book acquisitions in the library are also captured into an official corporate system. The timing of these tweets and the lending rates of the promoted books are regularly compared to measure the effectiveness of communication strategies.

Other tweets sent by the authority to congratulate the local football team are not formally captured into corporate recordkeeping systems. These tweets are for promotional purposes only and have limited accountability or business utility.

### Recordkeeping strategies for the social media environment

- Convene meetings of staff using social media to identify the information they will need now and into the future to support their operations.
- Ensure that whatever social media application you use has export functionality. This will enable you to take your business information out of the application and export it into your corporate environment.
- Use third party services to provide you with regular reports listing all your tweets or Facebook status updates, comments and responses.
- Document the architectures and configurations of corporate blogs or wikis. This will be necessary for migrating data to new versions of blogs or wikis or for exporting data into internal systems. Determine whether you will capture information at regular intervals, or at project completion date, and what formats are best for export.
- Develop strategies to integrate data generated via social media applications with official business processes and existing recordkeeping procedures.
- Know how long you need to keep your social media records for. If you only need them to support short term reporting needs, then it is likely they can remain in their creating application. If you are going to need them for some years, they will need to be exported and supported so they remain useable and accessible.
- Capture RSS feeds or reports from social media monitoring or reporting services.
- Be aware that your organisation is likely to be using several social media applications and you may need different approaches for each of them.
- Determine the metadata needed to identify and support your social media records, so that it is clear where they were generated, when and by whom.
- Where formal business processes are performed using social media, ensure that records can be captured to demonstrate the accountable transaction of these processes.
- Be aware of the different storage and management requirements of different social media records, such as Flickr photos, You Tube videos and wiki files.

### Further information

See State Records' Future Proof blog for more advice on social media and recordkeeping or contact State Records via email: [govrec@records.nsw.gov.au](mailto:govrec@records.nsw.gov.au)

<http://futureproof.records.nsw.gov.au>  
Future Proof: protecting our digital future