Information Management Advice 57 Managing Social Media Records Part 4: How to Capture Social Media Records

Introduction

This Advice presents a range of information management strategies you can apply to your social systems, based on your specific business needs and risks. The strategies you choose need to be based on an analysis and understanding of these risks. You may need to choose different information management strategies for each of the different social media channels used, depending on the different levels of traffic, risk and discussion within each.

Tools and Approaches for Social Media Record Capture

As social media is relatively new and rapidly evolving technology, there are few defined, best practice ways for making and keeping social media records.

Agencies also use different social media channels, in a variety of different ways and for various different types of business operations.

Given there are no easy answers for how you should capture and keep your social media records, you should choose the strategies that best meet your business needs and technological environment, while making a full assessment of the potential risks involved.

Any information management strategy you choose should be regularly reviewed, as your agency's use of social media may move from fairly passive use, to active and engaged. Once social media channels become widely accepted for business communication and engagement in your organisation, it is likely there will be a greater need for effective management of the information generated.

Strategies to choose between are:

- 'Leave the information where it is' strategy
- Low level information management strategy
- Monitoring- based information management strategy
- Needs-based information management strategy
- Reporting as an information management strategy
- Information for reuse strategy
- Information Management for accountability strategy
- Information management through broadcast systems strategy

Strategy 1. "Leave the information where is it"

What this means

You choose not to capture and keep information of your social media business operations in internal systems, choosing instead to leave your business information in its native social media application.

For example: You do not export any tweets out of Twitter. Instead you choose to leave all tweets, retweets, mentions etc. in your Twitter account.

It is important to note that you cannot choose a default 'leave the information where it is' strategy, it must be a specific risk-based decision.

Why would I choose this?

You would choose this strategy if you believe there is no long term value business information in your social media application, and your business areas will not require ongoing access to this information. You would also need to ensure that all staff who require access to this information, are able to gain access to it through the social media system. This would need to be reviewed against the Agency Social Media Acceptable Usage Policy, particularly if you have a tiered level of access provision.

What are the risks of this approach from an information management perspective?

This strategy:

- *Does not guarantee ongoing accessibility of business information*
  Many social media service contracts give providers the right to permanently remove content at any time, without recourse. Therefore, by choosing to use this strategy, there are no guarantees that social media-based information will remain accessible.
- *Could result in unacceptable risks*
  If business, reporting or legal requirements mean that you will need to access your social media information for 2 or more years, it may be an unacceptable risk to rely on social media applications to maintain this information for you.
- *Needs to be deployed following specific risk-based decisions*

In many scenarios it may be that a 'leave the information where it is' strategy may be an appropriate business choice for you, but you do need to assess and accept all associated risks before making this choice.

Case study: State Records uses the 'leave the information where it is' strategy for some of its social media accounts

State Records NSW runs a Facebook page for its Future Proof strategy. This Facebook page duplicates the information posted to the @FutureProofNSW Twitter account. No information is posted specifically and uniquely on Facebook.

Strategies are in place to capture and keep information about Twitter activity.

A very limited number of comments are received on the Future Proof Facebook page. An RSS feed has been set up which enables these comments to be sent as emails to a defined account, and these are captured into the corporate records management system.

Therefore:

- the information on Facebook is generally duplicated elsewhere
- the information does not need to be kept long term
- the Future Proof Twitter and email accounts already have defined information management strategies
- the organisation is prepared to accept the risk that Facebook makes no guarantees of the long term accessibility of the information it hosts

The decision has consequently been made that the Future Proof Facebook page does not need a defined information management strategy.

Strategy 2. Low level Information Management

What this means

You capture regular, scheduled downloads of your social media information using freely available online tools.

Why would I choose this?

You would choose this strategy if you wanted to keep simple yet comprehensive information about your social media transactions.

Available tools are also online, easy to use and frequently free or available at a very low cost.

What are the risks of this approach from an information management perspective?

This strategy:

- *Requires scheduling*:
  This strategy requires someone to perform regular downloads of social media content and to capture this information into an appropriate storage location. If this is not performed, the risk is irregular, non-systematic information management.
- *Generates standard data dumps*
  This strategy creates data dumps in standard formats which may require additional processing in order to be reused for other business purposes.
- *Results in data duplication*
  Online tools that can generate these downloads are often designed as data backup tools. They will generally download all data in your social media account, and will not necessarily enable you to specify that you only want data from a specific time period. This can lead to duplication in your social media information, particularly for active accounts.

What tools can be used to do this?

Many tools including:

- Cloud-based backup systems like Backupify
- Social media management/monitoring or dashboard tools
- Reporting tools that come with social media applications, such as Facebook Activity Logs

- Analytical tools such as Google Analytics or blog software analytics

NB. Please contact the Government Information Strategy Unit if you want to recommend other tools for this list.[1]

Strategy 3. Monitoring based Information Management

What this means

You use a social media monitoring tool to capture information about your social media conversations, as well as reactions to this engagement.

Why would I choose this?

Monitoring tools can capture both social conversations and also reactions to your conversations and operations. As such they provide both information and business intelligence about your social engagements.

Case study: Many government organisations use monitoring tools

Government organisations are using monitoring tools, and exporting information out of these tools, to use for business and information management purposes.

For example, some organisations are using monitoring tools to:

- identify all tweets that mention the organisation or its products and services, in order to monitor public opinion of the organisation or reaction to its services
- track the organisation's own tweets and any responses to these
- track the rise and fall in followers, 'likes' or re-tweets
- compile broad metrics to assess the impact of their social engagement

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The benefit of using these systems for information management purposes, is that they overlay social media information with business intelligence. They are valuable for business reporting and can therefore serve multiple business purposes, rather than just a specific information management objective.

What are the risks of this approach from an information management perspective?

This strategy:

- May be hampered by a lack of export capacity in some tools:
- Risks may arise if the monitoring tool you are using is unable to export or fully export data into your corporate business systems.
- May be hampered because some tools export data in limited formats:
- Some systems may only export information in formats designed to support machine processing (such as CSV), rather than formats that support information dissemination, or business use and reference.
- Can be costly because monitoring tools can be expensive

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[1] gisu@education.tas.gov.au

- Some monitoring tools can require a more significant financial investment than other, simpler strategies.

What tools can be used to do this?

- Social media monitoring or dashboard tools
- Reporting tools that come with social media applications, such as Facebook Activity Logs
- Analytic tools, such as Google Analytics or blog software analytics

Strategy 4. Needs Based Information Management

What this means

You deploy information management strategies as specific needs arise.

Why would I choose this?

You would deploy a needs-based strategy if most of your social media traffic was very low risk conversations. However, if a specific issue arose or if you wished to consult on a particular project, you could deploy an information management strategy to capture these specific conversations.

What are the risks of this approach from an information management perspective?

This strategy:

- *Requires ownership and management*
  If no one takes ownership of information management when it is required, the risk is a strategy will not be deployed to support higher risk conversations.
- *Requires active awareness and engagement.*
  This strategy requires an active understanding of your social systems, an awareness of when more high risk transactions and conversations are taking place and an understanding of what information management strategy should be deployed to support these.

Case study: Using needs-based information management as a strategy when things go wrong

On its Facebook page, an organisation posted details of a community event it was running in a regional area. For the next several days there was a large negative reaction to this event and many negative comments were made on the Facebook page. The organisation ultimately managed to diffuse and deal with this reaction, but they used screenshots to capture their initial post and all subsequent responses to it.

This information management strategy was to:

- compile reports to management on the significant public reaction
- provide intelligence and lessons learned for future event planning and communications
- protect the organisation against any defamation or legal action that could possibly have resulted

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Case study: Waikato District Health Board

In New Zealand, the Waikato District Health Board mounted a specific social media campaign to contain the spread of a measles outbreak.

Their social media campaign contributed to the successful management of the outbreak, and capturing information about their social media communications and all positive and negative responses to them could provide useful business intelligence for the management of future outbreaks.

What tools can be used to do this?

- Cloud-based back up systems like Backupify
- Cloud-based information services such as Social Safe and Archive Social
- Social media monitoring or dashboard tools
- General third party, cloud-based reporting tools like Storify
- RSS feed
- Screenshots

Strategy 5. Reporting as an Information Management Strategy

What this means

Documents compiled to report on social media campaigns and strategies, are maintained as information about these campaigns and strategies.

Why would I choose this?

If you need to compile regular reports to assess the performance of your social media strategy against identified benchmarks, then good information that summarises social media operations is already being created. Managing this can provide good ongoing information about your strategy.

This strategy is particularly effective for campaign-based social media use, as it provides regular information that can help focus messages, respond to feedback and improve performance, while also providing an ongoing record of social media operations.

What are the risks of this approach from an information management perspective?

This strategy:

- Needs to be reassessed if social media becomes normalised
- Regular reporting on social media strategies may only take place for a specific period of time. If social strategies become 'business as usual' processes and continue to operate beyond identified reporting periods, new strategies may be required to capture any required business information.
- Creates high level, not operational information
- Reports generally capture high level information about communications and metrics. If more detailed information about specific social media transactions is required by operational staff, other forms of information may be required to support these business needs.

Case study: Reporting on consultation strategies

The following case study comes from the New Zealand Government - Social Media in Government Toolbox:

To help us with reporting on our 'Making Tax Easier' online consultation, our web team showed us how to access the comprehensive and free details about the traffic on our site on Google Analytics.

This helped enormously when our senior management team asked for regular progress updates during the 6-week period the consultation was open for public submission. This was both the keep them up-to-date with the comments that were being received so they could advise the Minister of progress.

We combined key statistics from Google Analytics with an overview of the comments posted on the forum, highlighting trends and key issues, into a simple two page weekly report.

Weekly reporting also gave us the opportunity to reflect as a team, and to think about deploying further marketing strategies when the numbers of new visitors started falling.

Brent Lewers, Senior Policy Analyst Inland Revenue (New Zealand Government Controller and Auditor-General, Learning from public entities' use of social media, June 2013)

Strategy 6. Information for Reuse

What this means

You capture information from your social systems in order to reuse this information for future business purposes.

Why would I choose this?

You would adopt information for reuse if you are performing lots of transactions on your social sites and there is the potential for cost, time and performance efficiencies through the effective reuse of the information generated through these transactions.

The information for reuse strategy involves capturing information about advice provided on social systems in a spreadsheet, database or other searchable and accessible environment.

When similar advice is required in the future it does not have to be redeveloped, but can be copied and reposted as required.

This provides benefits through the provision of consistent advice, and can also assist if many different staff across your organisation are providing customer service through your social channels.

You would not choose this strategy if you needed specific evidence or accountabilities around each specific instance of advice provided. If you need clear accountabilities and evidence of specific instances of advice, you require a 'information management for accountability' strategy (see next section). With the information for reuse strategy, you are just reusing good advice for efficiency and consistency.

> **Case studies: Efficiencies achieved by information for reuse strategy**
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> One government organisation runs a large spreadsheet where customer service staff record the questions that clients ask on their corporate Facebook page, and the answers staff post. Now, before responding to the majority of questions, staff perform a quick search of the spreadsheet and can frequently reuse advice previously provided.

What tools can be used to do this?

- Purpose-built databases or spread sheets are commonly used for this purpose.

Strategy 7. Information Management for Accountability

What this means

You deploy a rigorous management approach to all your social media activities. You capture full and accurate records of all your social media business.

Why would I choose this?

You would choose this approach if:

- high risk business operations are moving to social systems
- you have long term business and community accountabilities in these business areas
- you need clear accountability and evidence of advice provided via social media, and of your social media transactions
- your organisation has a high risk profile and needs to be able to fully account for its public statements and operations

In all of these scenarios, a rigorous information management strategy will ensure strong evidence of your social media operations is accessible, accountable and useable for as long as you require it.

What are the risks of this approach from an information management perspective?

This strategy:

- *Can be expensive to implement effectively*
  Purpose built software tools can be expensive to design, configure and deploy but this cost could be justified in key strategic circumstances
- *Is a maximalist approach*
  This is a comprehensive strategy that will capture a lot of transactional information, but this may be warranted in high risk business areas or for key social strategies
- *Requires good configuration and management*
  Because of the volume of information that potentially will be captured, systems used for the "information as accountability" strategy need to be well designed and configured, to help apply business appropriate management rules to the social information generated.

> **Case study: Accountabilities don't change in social environments, and so rigorous information management may be required**
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> A large government department operates in a high risk, complex, litigious business environment with lots of stakeholders and lots of necessary community consultation.
>
> To broaden the reach of their communications, they have moved most of this consultation to social media. As a business and communication strategy, this is a sensible approach but as part of this approach, information governance and information management needs must also be considered.
>
> Given the contentious and long term implications of their business processes and decisions, the legal rules that apply to their business mean that they have to keep the records of their public consultation for many years.
>
> **These legislative requirements do not change because business processes have moved to social systems**.

What tools can be used to do this?

Purpose built social media information management systems, available from a variety of vendors, have the capacity for this management. Another advantage of comprehensive and purpose built systems is their capacity to capture, manage and leverage much of the native metadata attached to social media communications. Leveraging this metadata in these systems allows social media content to be navigated, authenticated, managed and used.

Strategy 8. Information Management through Broadcast Systems

What this means

Some large organisations, such as those involved in emergency management, need to be able to communicate mass broadcasts in emergency situations, and communicate these messages through multiple delivery channels

> **Case study: Emergency fire communications**
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> Fire and Rescue NSW's Bush Fire alert system can be programmed to issue emergency bulletins. In January 2013 on a day of extreme fire danger, the system broadcast 40 emergency alerts through social media, and 784,000 SMS and 224,000 fixed line messages in fire forecast areas.

Why would I choose this?

These systems would be adopted by your organisation if it has business needs for large or pre-programmed communication.

What are the risks of this approach from an information management perspective?

This strategy:

- *Does not guarantee ongoing information accessibility*
  In terms of information management, there are no guarantees that the information maintained in the broadcast system will remain accessible for long periods of time.
- *Requires a strategic understanding of information needs*
  The majority of information in these systems will generally be secure for the life of the system, but if the system is upgraded, replaced or decommissioned, you will need to determine if any information in the system needs to be kept for ongoing business or legal purposes.
- *May require export capacity to ensure ongoing accessibility of long term value business information*
  If communications generated by the system need to be kept for long periods of time or if they need to be presented in court cases, these may need to be exported out of the broadcast system and managed elsewhere for as long as they are required. For high value information, it may be easier to export this regularly after an emergency event out of the system and store it in a central business system, rather than determine at system decommissioning what information requires export for ongoing support and management. If it is likely that this information will be needed in legal cases, governance around any information export and system decommissioning processes should be rigorous, and clearly demonstrate the comprehensiveness and accuracy of these processes.

Selecting an Information Management Strategy

You need to base your information management strategies on what your specific business needs are.

1. We are broadcasting standard marketing messages to our clients and user community

A) If these communications are routine and you have no business needs to maintain information about them:
- consider the Leave the information where it is strategy and leave all information in the social media application/s you are using, or

B) If you need basic information about these communications for reporting or monitoring purposes:
- consider a monthly or half yearly export of your messages using the low level information management strategy

2. We are having conversations with our clients and user community on social media

A) If these conversations are routine, self-contained or provide standard advice and you have no business needs to maintain information about them:
- consider the Leave the information where it is strategy and leave all information in the social media application/s you are using, or

B) If advice provided by staff is not routine in nature, if it is complex or involves vulnerable clients or relates to ongoing matters, or needs to be referred to by other staff members for advice:

- these conversations require much more rigorous management. Processes need to be in place to export these conversations for case management, business continuity and/or accountability purposes
- consider deploying a needs-based information management strategy or a information for accountability strategy, depending on which best meets your business needs

3. We are publicly consulting on a plan, strategy or project using social media

A) If there is a business need to use the public feedback received through social media:
- consider deploying a needs-based information management strategy or an Information for accountability strategy, depending on which best meets your specific business needs

4. We post videos explaining how to use our services on YouTube

A) If these videos provide routine advice to your community and you have no specific business or accountability needs to maintain them:
- consider the "Leave the information where it is" strategy and leave your videos on YouTube until you no longer have a corporate need for them, then delete, or

B) If these videos are significant, explain an important policy or mark a significant public statement or new public direction for your organisation:
- develop an appropriate management plan for your corporate video before it is uploaded to YouTube. Content exported out of YouTube and back into corporate systems can be of lesser quality than the original uploaded content. Organisations frequently do not maintain copies of video content on internal servers when it is accessible via sharing mechanisms like YouTube. For high value or significant videos, however, it can be important to maintain a copy in internal systems.

5. We use social media to monitor community sentiment and to revise our products, advice or services accordingly

A) If this monitoring is routine and informative and does not result in significant changes to your business and you have no ongoing business needs to reference this data into the future:
- consider the "Leave the information where it is" strategy and leave all information in your social media monitoring tool, or

B) If the monitoring data informs planning and decision making in your organisation and is needed as justification for changes in policy, product or service direction:
- consider a monitoring-based information strategy or a needs-based information strategy

6. We have some difficult users engaging with our community in our social channels and we want to remove some challenging content

A) If you have concerns about defamatory or obscene content that is posted on your social media channels:
- use a needs-based information strategy to capture a record of inappropriate content in case legal or other business needs arise to explain your actions and then remove the offensive content from your social channel. Use internal information management processes to manage the offensive content removed from your site.

Organisations can be responsible under defamation legislation for defamatory content that others post on corporate social media accounts.

Tools for Capturing Social Media

TAHO does not recommend any specific capture technology because:

- different capture technology is required for different types of social media
- Government agency needs vary widely, and agencies should independently investigate the options available to identify the capture technology solution that is best-suited to them
- social media capture technology is a rapidly changing area, and specific recommendations will quickly become redundant.

There are commercially available products designed for capturing social media records. Agencies should thoroughly investigate the specifications and Terms of Service for any product before commencing use, to ensure the product meets their capture, privacy and security needs.

Any automated process for capturing social media records should be able to store the metadata required to contextualise the message appropriately. The metadata should communicate the relationship between the record, the context that the social media was used in (for example, a statement or a reply), and any other related documents that help make the social media usage understandable.

Many services for backing up social media records require the data to be stored on a cloud computing system. Agencies should refer to the Terms of Service, investigate whether the service is cloud based, and be aware of the legal and privacy implications of storing data in a cloud computing system before subscribing to any back-up service.

In general, no solely online-based system should be employed for recordkeeping without a copy being kept within the agency's systems.

An easy to apply low-tech capture method suitable for those with low-volume social media usage, or limited agency budget for purchasing other capture technologies, is to convert screenshots to .PDF and to register the resulting document in an Electronic Document and Record Management System (EDRMS) to record the necessary metadata. If an EDRMS is not available, placing the record on a file with the above metadata attached is an alternative.

The table on the following pages lists a range of current recordkeeping tools, discussed above in the strategies for capturing and keeping your social media information, and the pros and cons associated with each approach.

It is likely that use of a combination of these tools will build the most effective social media information strategy for your Agency.

Tool/Approach	Pros	Cons
Leaving data in its native social media application	No separate recordkeeping effort required No additional software or applications required Staff using the application will know how to access and use the information it contains Short term value information is not likely to be at risk	Long term value or high accountability information will be at risk due to projected frequency of system change Risks to ongoing information accessibility exist because information remains under the control of an external third party Limited corporate information accessibility if a log-in is required to view or use data
Using available APIs to regularly export your information from social media applications	Information is regularly exported into corporate system Corporate information is brought back into corporate control Exported information can be fed into all relevant business systems and processes	Technical knowledge is required APIs can change and so API-based export strategies may require regular update Different APIs will be required for each social media channel
Cloud-based back up system like Backupify	Free, basic online services Support a wide variety of social media applications Information can be regularly exported Corporate information can be brought back into corporate control Some information is exported in open, non-proprietary formats (For example, Backupify generated Twitter reports are in PDF) These services work with a range of social media channels, including Google apps	These tools are back up tools, not recordkeeping tools. Their interfaces and data exports are designed to satisfy IT and backup requirements, not business or recordkeeping needs. For example, Facebook data is exported by Backupify in JSON which meets backup needs but which is not readable or accessible for standard business environments. With these tools, export of information out of social media applications is automated, but downloading of this information out of the cloud is not. Downloading and capturing into corporate systems must still be performed as a manual, scheduled process. As they provide backup services, these tools generally download **all** your social media information, not information from a specific time period. The same legacy data will generally be downloaded each time you do a backup, resulting in significant amounts of duplication for high transaction accounts

Tool/Approach	Pros	Cons
Cloud-based information services such as Social Safe and **Archive Social**	Free basic online services, scaling to fees between \$US5 – \$29 per year for full service options Support a wide variety of social media applications Consolidate a variety of social media data into one exportable document Information can be regularly exported into corporate systems and into corporate control	The long term accessibility of the data presentation format requires investigation
Social media monitoring or dashboard tools	Many third-party, cloud-based tools are available for free, such as HootSuite aggregate information from several social media channels can piggyback information management needs on the back of existing reporting or monitoring arrangements Provide reporting and listening services to monitor the effectiveness and impact of your social media presence Aggregating and reporting functionality creates very useful business information	Limited information accessibility if a log-in is required to view or use dat. There may be limits on the reporting and analysis information that is available for export. Key business intelligence and reporting information is contained in reports and analysis so exportability of this information needs to be verified Some organisations use licensed applications such as Radian6 and Alterion. While offering good functionality, these systems can be very expensive to deploy and the exportability of their information needs to be verified.
Reporting tools that come with your social media application, such as Facebook Activity Logs	Free, online services Generally export to PDF and other widely open, accessible formats Capture all activities that occur on social media sites	Export needs to be manually performed Information is flat and not dynamically available to reuse or repurpose Need to determine whether information exports can be performed periodically, or whether full information downloads are performed each time.
Analytic tools, like Google Analytics or blog software analytics	Free, online services Useful for monitoring blog use, search engine terms, referring sites, top posts and pages Some information can be exported Some corporate information analysis can be brought back into corporate control	May not export reports May not export reports in business-ready formats May need to be supported with screenshots, written reports or other ways of capturing the business information they contain.
General third party, cloud-based reporting tools like Storify	Free, online services Can allow you to gather a range of disparate social media information sources into one place to tell a story Particularly useful for capturing different sets of online information about events or conferences	Export functionality may not be present

Tool/Approach	Pros	Cons
Use a purpose-built software tool	Can be designed to meet your specific business requirements Can be designed to integrate and share information with your corporate business applications Can provide a very comprehensive and accountable recordkeeping solution Information capture and management can be automated	Will take time and money to develop Will possibly need to be upgraded as social media applications and approaches change
RSS feed	Free Useful for a range of social media applications Useful for auto-populating Twitter and Facebook based on blog updates Can send an email containing a complete blog post to a designated account Can be configured so that certain events such as a blog comment, re-tweet etc will trigger an email to be sent to a designated account and this email can then be captured as a record	Emailed records will require manual intervention to capture into corporate systems for accessibility and useability
Excel spreadsheets manually updated with social media information	Records can be kept Information can be kept in accessible formats	Information needs to be manually updated Information will require regular staff commitment to keep up to date For active accounts, there will be a significant cost in staff time
Screenshots	Records can be kept Information can be kept in accessible formats Images provide an exact representation of the content as it appeared in the social media application	Information needs to be manually updated Information will require regular staff commitment to keep up to date Information is flat and not dynamically available to reuse or repurpose For active accounts, there will be a significant cost in staff time
Reports of pre-scheduled posts	Record is compiled as part of process of developing and authorising social media posts	Information is not an exact representation of what was posted on social media sites but is an approved record of what was authorised to post

Records Staff can Deploy Social Media Monitoring Tools

Rather than rely on business areas to make and keep records of their social media activities, records staff can deploy social media dashboards and monitoring tools to monitor all internal social media accounts, and to export the information from these accounts as required.

Services in this area are very Subject to Change

It is very important that you keep an eye on any recordkeeping solutions you implement for your social media. Many of the free online services that are available offer very good and useful functionality, but these technologies are evolving rapidly.

A solution that suits you today may evolve into something different tomorrow, or a solution that exists today may disappear entirely tomorrow.

Many free services are experimenting with formats, functionalities and services and the capacities they offer may change quite regularly.

All the free services are ultimately actually commercial operations and so the services they offer will be driven by business imperatives. For instance, Backupify announced in December that they will no longer be providing backups of LinkedIn data. Increasingly, their corporate revenue is coming through backup for enterprise-based SaaS applications. They are therefore focusing less of their resources on consumer back up requirements, and more on corporate requirements.

Therefore be very aware of change and vulnerabilities in this space, and monitor whatever services you deploy, to ensure they continue to meet your business needs.

Use Recordkeeping Channels that you Already Have

One organisation, when seeking community consultation via social media, directed people back to its organisational blog to provide feedback. The blog was set up with an RSS feed so that any comments received on it were emailed automatically to relevant staff. Subsequently, the staff were able to capture these emails into their corporate records system, based on existing processes and procedures.

Use Management Reports for Recordkeeping Purposes

Social media is still a relatively new technology in many government organisations. Management in some organisations is still yet to be convinced of the validity of social media as a business tool and, while its business relevance is being evaluated, many organisations have strong reporting requirements around social media.

If your organisation is unwilling to commit to third-party tools or other investments to support the management of social media information, business reporting can be captured and used as a means of making and keeping records of your social media operations.

For example: Many organisations still plan their tweets, and send their proposals through for official endorsement. These records could be captured as official records of your social media activity, rather than the tweets themselves.

Use Recordkeeping Strategies to Bring Social Media Information Together

You want to avoid your individual social media channels becoming separate silos of corporate information.

Thinking strategically about business and determining how specific business processes could benefit from the information generated by your social media channels, can help to determine what information from your social media applications you should capture and share.

Social media management tools (SMMTs)

SMMTs (eg HootSuite, Scroon, TweetDeck) offer the ability to manage content through a variety of social media channels to build an overview of your social media presence. These tools allow for the management of multiple accounts, sometimes over multiple networks, allowing simultaneous updating of several (or select) accounts at once. Some tools even allow for updates and follow up messages to be assigned to specific social media 'managers' within the organisation, allowing subject matter experts to respond to appropriate questions and comments.

Similar tools developed in-house or in conjunction with third party development companies can often provide integrated solutions that will capture updates to your EDRMS, when broadcasting updates to your social media accounts.

Use Social Media Recordkeeping as an Opportunity to Improve your Business Intelligence

You can use social media as an opportunity to expand your awareness of both your clients and your operations.

If you use monitoring or reporting tools to track or measure your social media operations, ensure that the tools you use can export copies of these assessments or reports. These records can be captured and used across your organisation to feed into business intelligence, planning, service improvement etc.

You can use this reporting to:

- Measure the impact of the content you are sharing
- Identify topics of interest and relevance to your community
- Improve your services

Case study: Vizie Social Media Monitoring Tool

The CSIRO is developing social media monitoring software called Vizie. Based on the CSIRO's research in text analysis, the software monitors and evaluates tweets, blogs and posts to determine hot topics, issues that relate to organisational operations, and business matters discussed in social media channels that may be addressed. It also generates and exports information reports. CSIRO is looking for government bodies who are interested in trialling their Vizie software.

Make use of Twitter hash tags

One way to gather together tweets on a specific issue or service, is to search on a specific hash tag.

Hash tags are a means of labelling and classifying tweets. Specific events such as a conference will have a hash tag (for example #ICA_2012), concepts can have a hash tag (#archives), or specific organisations or services can have a hash tag (#staterecords).

Searching for a specific tag will bring together all tweets that contain the hash tag, which you can then copy and export.

Specific information management issues relating to Twitter

Australian government Twitter statistics:

- By 25 January 2013, government agencies across Australia had tweeted a total of 1,021,046 times
- There were 852 active social media accounts across Australian government.
- These accounts were followed by 1,794,257 followers.
- NSW government had 174 Twitter accounts with 288,077 tweets and 394,279 followers.

Source: Infographic: *The top government Twitter accounts in Australia*[2]

Be Alert to Information Loss that can be Caused by Short URLs

Many tweets contain links to longer forms of information and, because tweets must be 140 characters or less, many of these links take the form of short URLs.

Example: bit.ly/UpZXrR is the short URL for http://futureproof.records.nsw.gov.au/what-recordkeeping-functionality-do-business-systems-need-to-provide/

Short URLs are likely to be less supported and accessible than regular URLs. They are designed as a short term service and no guarantees are provided about their longevity.

In addition, as you can see from the example above, a regular URL generally provides information about the location and context of an online resource whereas an auto-generated short URL does not.

In a social media recordkeeping strategy you may want to look at the short URLs contained in your organisational tweets, or other social media sources. You should ask questions like:

- In a year's time, is it going to be important to know what this information referred to actually was?
- Will we need to know what webpage a client was pointing to in their comment?

In many instances it may not be significant but, if in particular business areas it is going to be important to know what was being referred to, you should develop a means to capture a record of the referenced web page where necessary.

This capture could be a manual process to capture either the full URL or a screenshot of the page itself. Alternatively it may be possible to develop an automated process, and deploy a tool that will automatically take a copy of the web pages referred to in your tweets.

Depending on their business purpose, some Twitter accounts will reference external links much more significantly than others. For example, a Twitter account used for marketing or communications will generally point off to a lot of other web-based resources, while another that is used to facilitate discussion and debate will not reference as many external resources.

Consider the use of Different Twitter Accounts for Different Business Purposes

If it is likely that you will have a broad range of tweets and re-tweets in your account, ranging from business critical commentary through to tweets about new library acquisitions, you may want to create several Twitter accounts, rather than funnel all corporate business through one account.

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[2] http://egovau.blogspot.com.au/2013/02/infographic-top-government-twitter.html

If you have one account and some business critical information passes through it, if you use certain recordkeeping strategies such as running a report through a third party service, it will provide you with a record of all tweets in your account, not just the key tweets.

If you only want to capture key tweets, you can set up RSS feeds to provide you with copies of all your tweets, re-tweets etc, and then you can capture the key tweets as emails and leave the others in Twitter.

Creating several accounts gives you more options for information management. For example, you might want to create a @CouncilXyoursay account where you encourage ratepayers to comment on current issues and a @CouncilXArts account for news and information about local art exhibitions, public art initiatives, community projects and workshops (see **@KC_ArtsCulture**; **@CCC Arts and Events**). You should deploy different information management strategies for the different accounts, based on the levels of business risk you identify.

Specific Issues Relating to Wikis

With these types of complex systems you need to ask fairly complex questions to try and determine exactly what parts of the system you need to keep as a record.

Questions to ask to help you define what records need to be captured and kept are:

- What information do we want - *and need* - to keep?
- Can we prioritise by risk and focus on extracting and maintaining critical data?
- What metadata is necessary to document context, and for audit and management purposes?
- How long do the records need to be kept for?
- Do we need to keep change history and revisions?
- Do we preserve at intervals, or at a particular project completion date?
- Do we preserve text content, or complete functionality, or the look and feel of the site?
- How do we capture records? What formats can, or should, be used for export and for ongoing storage?

Specific Issues Relating to Collaborative Editing Tools

With collaborative editing tools like Google Docs, it is critical to consider the strategic management requirements that apply to collaborative documentation that may be shared across organisations.

You need to develop rules or requirements such as:

- what technical and administrative controls are required, such as secure log in?
- what version controls are required?
- what revision history needs to be documented?
- is there the capacity to lock down pages?
- what back up services need to be implemented?
- how will be the capture of necessary metadata be arranged?
- how is ownership between multiple collaborators to be determined?
- how will access arrangements between multiple collaborators be determined?
- when export will be performed – regularly or at project completion?

Further Advice

For more detailed advice, please contact:

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- State Records of New South Wales

Information Security Classification

This document has been security classified using the Tasmanian Government Information Security classification standard as PUBLIC and will be managed according to the requirements of the Tasmanian Government Information Security Policy.

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Amendments in this Release

Section Title	Section Number	Amendment Summary
All	All	Document imported into new template

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State Archivist