Managing and Preserving Social Media

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Introduction

Social media services allow for effective communication with the public but come with certain records management challenges. Unlike websites which are operated by either internal IT staff or a contracted vendor, content posted to any social media site is under the control of a third-party organization that does not have the same obligations to retain, manage, and provide access to that data. Social media platforms may change or terminate their services without notice or be replaced by newer and more popular ones, putting any information held on them at risk of being deleted or made inaccessible.

For that reason, it is important for public bodies to pro-actively manage their social media content by periodically migrating any records of long-term value from the site and back under their direct control. There are several methods to achieve this. Some platforms provide built-in tools to export data associated with an account, which may be sufficient to capture the necessary information. Commercially available social media archiving or management tools can also be used to capture and export data. Due to the variety of social media platforms available, and the frequency with which they change, these guidelines aim to provide general recommendations for the management of social media records created by public bodies, rather than platform-specific advice.

Please send any questions or comments you have about these guidelines to the Corporate Information Management unit (records.centre@gnb.ca).

Scope

In this document, the term *social media* is used to mean any third-party online services or tools used for the publishing, sharing, and discussion of information and can include social networking sites (Twitter, Facebook, Instagram, YouTube, TikTok, etc.), blogs, wikis, and any other websites that allow individual users to upload and share content.

The appropriate usage of social media by public bodies and their employees is not covered here. For guidance on that topic, Part I departments and agencies can refer to the Use of Social Media standard, maintained by the Executive Council Office's Corporate Communications unit.

Is information shared on social media a public record?

A record is information that provides evidence of a business activity, decision, or transaction related to the functions and activities of the government, regardless of format. Non-records are items that are duplicates, or that are transitory in nature and have no long-term or future value.

Whether information shared on social media constitutes a record depends on:

- The content of that post
- Whether that content is unique, or unnecessarily duplicates information managed elsewhere

Comments on social media posts can in some cases also be records.[1] Consider:

- Did the comment elicit/require action?
- Was the original post created with the intent to solicit public feedback on a topic?
- Does the comment contain a threat, or other conduct that should be documented in the case of legal action?

Examples of common scenarios:

- Information distributed on social media (press releases, schedules, announcements, etc.) should still be kept internally, and managed in an EDRMS or network drive according to the applicable records retention schedule. This saved version is the record, meaning that the social media post is transitory and does not necessarily need to be retained. Details such as the date the post was made can be saved in a social media content calendar, or other mechanism.
- Images or videos uploaded to social media platforms are often heavily compressed and are therefore of a reduced quality. The original files should still be retained and managed according to the applicable records retention schedule.

Records schedules

How long social media records must be kept is determined by records retention schedules, which are based on the content of the record rather than the format. As a result, social media content could potentially fall under several different retention schedules. Complaints sent via a message or comment, for example, would be covered by CPRS 0210 (Feedback Management). The nature of social media platforms, however, does not always lend itself to filing individual posts, or messages under separate retention schedules in an EDRMS or network drive. Whether that is possible will depend on both the platform, and the method you are using to capture the information on that platform; sometimes it may only be possible to periodically archive all site content. In those cases, CPRS 0385 (Public Relations) will likely be the best fit.

For records related to the planning and development of social media content, as opposed to saved copies of the content itself, refer to CPRS 0395 (Communications and Publishing).

Capturing social media

Management strategies for social media records will differ depending on your organizational needs, the platform, and the tools available to you. There are several approaches outlined below, each with their own advantages and drawbacks. While deciding which of these options to use, it is important to consider whether it will capture both the content and context of the records (including metadata, such as when a post or message was sent or received), and whether that data will be captured in an appropriate and machine-searchable format.

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[1] Note: In-depth correspondence with a member of the public should be conducted through email or other official channels, and no personal information should be sent through social media.

Approach	Pros	Cons
Leaving data in the social media platform	• Information of short-term value is not likely to be at risk.	• Information remains solely under the control of an external third party. • Any information of long-term value will be at risk due to the frequency with which social media platforms change.
Built-in platform specific export tools, including APIs (Application Programming Interfaces)	• Information can be exported periodically, as necessary	• Not all platforms include these tools • Some platforms' export tools may not include certain account data that should be retained by the public body • Some platforms may only allow you to export all account data, and so will include information that it is not necessary to retain
Commercially available social media archiving tools (ex: ArchiveSocial, Pagefreezer, Smarsh, etc.)	• Information can be exported periodically, or on an ongoing basis, depending on the tool used	• These tools are typically available for a flat fee, or ongoing subscription cost • A particular tool may not support all social media platforms currently in use by the public body
Social media management or monitoring tools (ex: HootSuite, SproutSocial, etc.)	• May already be in use by the public body • May be able to capture information from several social media platforms	• Some tools are unable to export data or are limited in their export abilities. • These tools are often not intended to be used for archiving and records management, so their output formats may not be machine-searchable, or mat be otherwise inappropriate for long-term preservation
Screenshots	• May be useful under certain limited situations (quickly providing information for an RTIPPA request, for example)	• Images are not machine-searchable, making content very difficult to find and manage • Capturing information using screenshots is a very manual process, which does not scale well.