

# Indiana Archives and Records Administration Social Media Best Practices

June 26, 2020

**Please note that this is emerging guidance and subject to change pending external review.**

## Social Media

The State of Indiana uses a variety of social media applications. Because social media providers do not typically take responsibility for retaining content shared via their platforms, it is crucial for agency social media content creators to understand what constitutes a public record on social media and how to properly retain it in accordance with Oversight Committee on Public Records approved retention schedules.

### Identifying public records

Social media posts are considered public records when three conditions are met:

1. The content of the post falls under Oversight Committee on Public Records approved record retention schedules.
2. The content of the post is unique (i.e. does not exist elsewhere).
3. The content is posted via an official agency account OR is posted via any account with the purpose of distributing agency information to the public.

Social media posts may fall under record retention schedules pertaining but not limited to:

- Correspondence
- Disaster notification and response
- Events, programs, products and services
- Photographs and videos
- Press releases
- Surveys
- Training and education

### IARA recommended best practices

1. Familiarize yourself with the [IN.gov Governance Council Social Media Guidelines](#).
2. Have a **content moderation plan**. Be clear with agency staff and users when it comes to rules of engagement with your social media accounts. Publicly post rules of conduct and document any infractions of those rules. If you do remove posts, save them to a secure, backed up, agency managed location for future reference. You may need to produce the posts later to support your decision-making process.
3. Have a **content capture plan**. Know how you are capturing and saving posts that are considered records. There are four methods of capturing social media content:
  - Create and manage any unique original content (i.e. content that does not exist elsewhere) in a location external to the social media platform (recommended).
  - Collect content manually via screenshots of posts and associated comments. Save screenshots as JPEG files in a secure, backed up, agency managed location following any file naming conventions your agency uses.
  - Download the data “archive” from the site. Please note that multi-media posts may need to be collected separately. This option is best if you believe most of your social media content constitutes a public record (see below for instructions for manually downloading an archive).

- Use a vendor to capture and manage social media content. If you decide to go this route, it is important that your agency fully understands how a vendor will retain content, how your agency will access content, and to have a plan in place in the event the vendor relationship is terminated.
- 4. Have a content **retention plan**. Know how long posts must be retained in accordance with Oversight Committee on Public Records approved retention schedules and have a plan for providing the Indiana Archives with a copy of any posts that qualify as permanent records.
- 5. Have an **exit plan**. Ensure any dormant or unused sites are retained in accordance with Oversight Committee on Public Records approved retention schedules and are not simply deleted when they are no longer needed or active. *In general, social media accounts should remain online for no less than three years after the date of the final post.* If you have questions about what content needs to be retained, please contact IARA.
  - Turn off any Direct Message/Private Message functions, and instead provide an official agency e-mail address on the profile page of the social media account. Alternatively, input an automatic response message redirecting private messages to an official agency email.
    - For private message conversations that have already occurred, download or take screenshots of all messages in each conversation and save them in a secure, backed up, agency managed location following any file naming conventions your agency uses.
    - All screenshots and subsequent emails should then be retained in accordance with Oversight Committee on Public Records approved retention policies.
  - If a public comment is received that warrants a non-public response, reply publicly to that comment indicating that the individual should refer question(s) to an official e-mail account.
  - Ensure all staff who post on behalf of your agency are aware of and understand these best practices.

### Manually download a social media “archive”

The following instructions pertain to Facebook, Twitter, and Instagram as they are three of the largest social media providers. IARA provides these instructions for convenience but please note that social media providers may change their download processes, terminology, and icons at any time. Not every provider allows for content to be downloaded or archived in the same way. Please be aware of your agency’s options for any social media providers in use and manage your public records accordingly.

Just as with email, when it comes to social media archives it is important to separate public records from everything else. This is especially important when it comes to providing permanent records to the Indiana Archives as the sheer volume of social media, content adds up quickly and storage is limited.

### Facebook

It is best to use a desktop or laptop to download, opposed to a mobile device.

There are three types of Facebook accounts: a **personal account**, a **public page**, and a **group**. The contents of both a personal account and a public page can be downloaded via Facebook. A group cannot be downloaded via Facebook at this time. IARA recommends agencies use public pages, not personal accounts or groups to communicate official business.

To download the contents of a **personal account**, go to Settings>Your Facebook Information>Download Your Information. Ensure the settings match those below:

Date Range:	All of my data ▼	Format:	HTML ▼	Media Quality:	High ▼
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Click Create File. When the download is complete Facebook will notify you. The download will be in the form of a ZIP file and will contain all content created by you. This includes Messenger messages and comments and likes you have left on other people's Facebook pages. It will not include the original text of any posts created by someone else that you have commented or liked. It will also not include any photos posted by someone else in which you are tagged.

To download the contents of a **public page**, go to Settings>General>Download Page. Ensure the settings match those below:

Date Range:	All of my data ▼	Format:	HTML ▼	Media Quality:	High ▼
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Click Create File. When the download is complete Facebook will notify you. The download will be in the form of a ZIP file.



#### *Twitter*

It is best to use a desktop or laptop to download, opposed to a mobile device.

Click the "more" icon (three dots) and select Settings and privacy>Account>Your Twitter data. You may see two options listed. Click Request archive next to the Twitter option. When the download is complete Twitter will notify you. The download will be in the form of a ZIP file. Please note that you can only make one archive download request every 30 days.

#### *Instagram*

It is best to use a desktop or laptop to download, opposed to a mobile device.

Navigate to your account settings by clicking on the person icon , and the settings icon . Select [Privacy and Security>Data Download>Request Download](#). Check that the auto-populated email address is correct and click Next. Enter your password and click Request Download. When the download is complete Instagram will notify you. The download will be in the form of a ZIP file. Please note that it may take up to 48 hours for the download to be available and download requests can only be made once every 4 days.