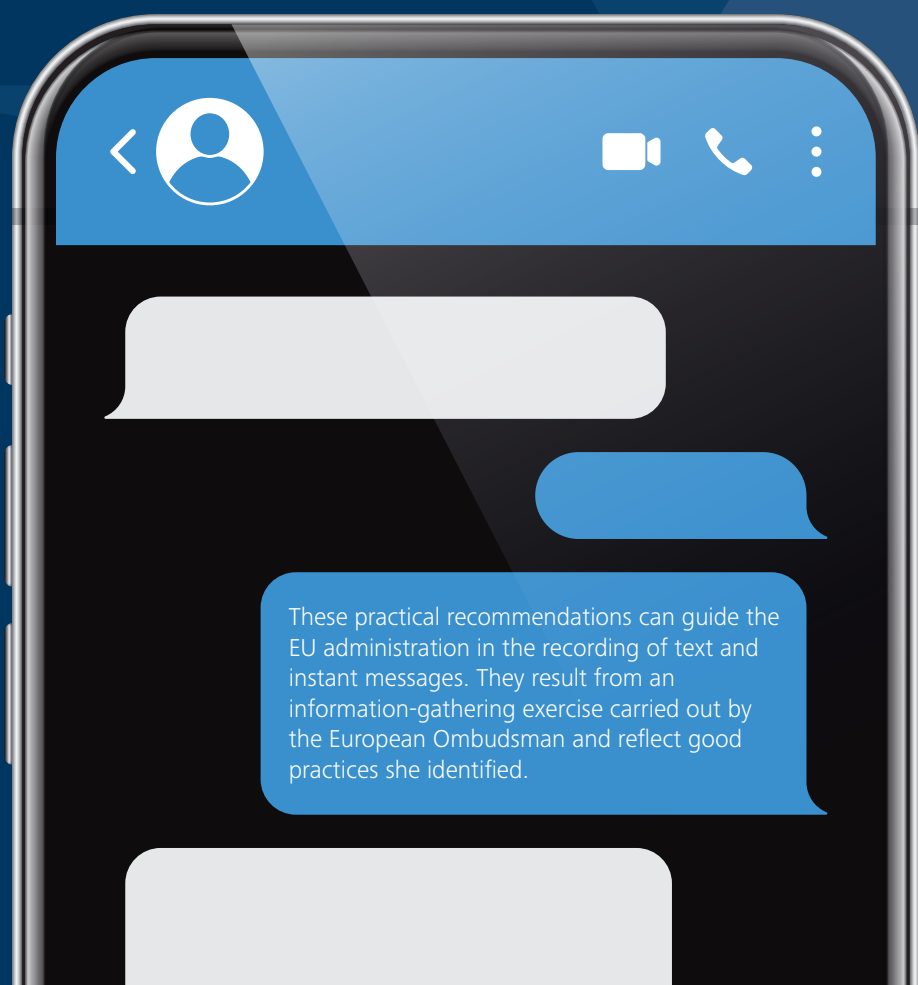




European
Ombudsman

PRACTICAL RECOMMENDATIONS
FOR THE EU ADMINISTRATION

The recording of **text
and instant messages**
sent/received by staff
in their professional capacity



These practical recommendations can guide the EU administration in the recording of text and instant messages. They result from an information-gathering exercise carried out by the European Ombudsman and reflect good practices she identified.



The EU institutions, bodies, offices and agencies should:

Take into account, in document management rules and practices, the ever **increasing use of text and instant messaging**.

Concretely, this implies that the decision to record a certain piece of information in the administration's document management system should not be dependent on the medium - be it a letter, an email, a text or instant message - but on its content.

Issue clear guidance to staff on how text and instant messages that meet the criteria on document recording should be extracted, transferred and recorded.

All staff using electronic devices for work should be able to understand how to extract and transfer text and instant messages from messaging apps or platforms to the relevant document management system.

Make sure that the **retention periods** for text and instant messages held on electronic devices used for work **are in line with the retention policy**.

Recognise that work-related text and instant messages are 'documents' within the meaning of Regulation 1049/2001 on public access to documents.

Ensure that their standard search tool allows for the identification of text and instant messages (as such) once they have been registered in their document management system.

Put in place technological solutions to enable the easy recording of text and instant messages in document management systems. In the meantime, provide for alternative ways of recording such messages.

Raise awareness among staff about the need to ensure that text and instant messages meeting the recording criteria are extracted, transferred and recorded regularly and routinely.

In addition to standard internal communication messages, this could be done by offering training to existing staff members and as part of induction programmes for new staff members, for example.

Have a process in place to ensure that, when a staff member leaves, any documents the staff member holds, including any text and instant **messages that meet the recording criteria, are recorded**.

When dealing with requests for public access to documents that could cover text and instant messages, **consider all locations where such messages might be stored**, including electronic devices used by staff, and assist staff potentially holding such messages in their searches, for example by giving instructions.