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European Commission

DIGIT

ARES

User Manual

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Typographic conventions

Typographical conventions used

<OK>, <Modify>		Names of pushbuttons, radiobuttons, checkboxes or icons
<i>Favourites/Add favourites</i>	<i>to</i>	Names of menus, options in drop-down lists
<i>Sheet, Assignment</i>		Names of fields, headings, tab pages, windows or options

The  symbol indicates a piece of information which is important.

Vocabulary

Click on: pushbutton or icon

Activate: radiobutton

Tick: box

Select: menu option

Press: key

Enter: type on your keyboard

General introduction

0. GENERAL INTRODUCTION TO ARES

ARES (acronym for Advanced Records System) is a document management system linked to 'Hermes'.

The aim of Hermes is to give the Commission an electronic document management system that makes it easier to comply with the e-Domec rules¹, as set out in the Decisions of the Commission² and their respective implementing rules³.

Hermes is designed to harmonise various Commission applications by adapting them to a common structure. It is a platform comprising, on the one hand, a set of modules which provides all the Commission's applications with basic services for managing documents (registration, filing, preservation, search, management of access rights, workflow) and, on the other hand, a single repository to store the documents handled by these applications. Documents are stored centrally regardless of how they are processed; this in turn ensures secure access, avoids any duplication and facilitates the sharing of information.

ARES is a common IT application that has replaced all the Adonis databases in the various DGs and Cabinets throughout the Commission. It aims, among other things, to reduce the number of copies of a given document that exist within the Commission, to facilitate better document management and to allow files to be retrieved more easily when access to documents is requested (for audits, for court cases, etc.)

The application NOMCOM (acronym for the common nomenclature) helps managing the Commission's files and filing plan⁴.

ARES and NOMCOM 3 are both clients of Hermes. Users register, save and file their documents in ARES and use NOMCOM 3 to manage the Commission filing plans and data connected with their files.


¹ E-Domec is the acronym for 'Electronic Archiving and Document Management in the European Commission'. It concerns the Commission's electronic archiving and document management policy, which has a number of different aspects: legal aspect, IT aspect and implementation aspect. This policy began in 2002.

² Commission Decision of 23 January 2002 amending its Rules of Procedure [notified under document number C(2002) 99]. Decision 2002/47/EC, ECSC, Euratom – Annex: Provisions on document management. OJ L 21, 24.1.2002, p. 23.

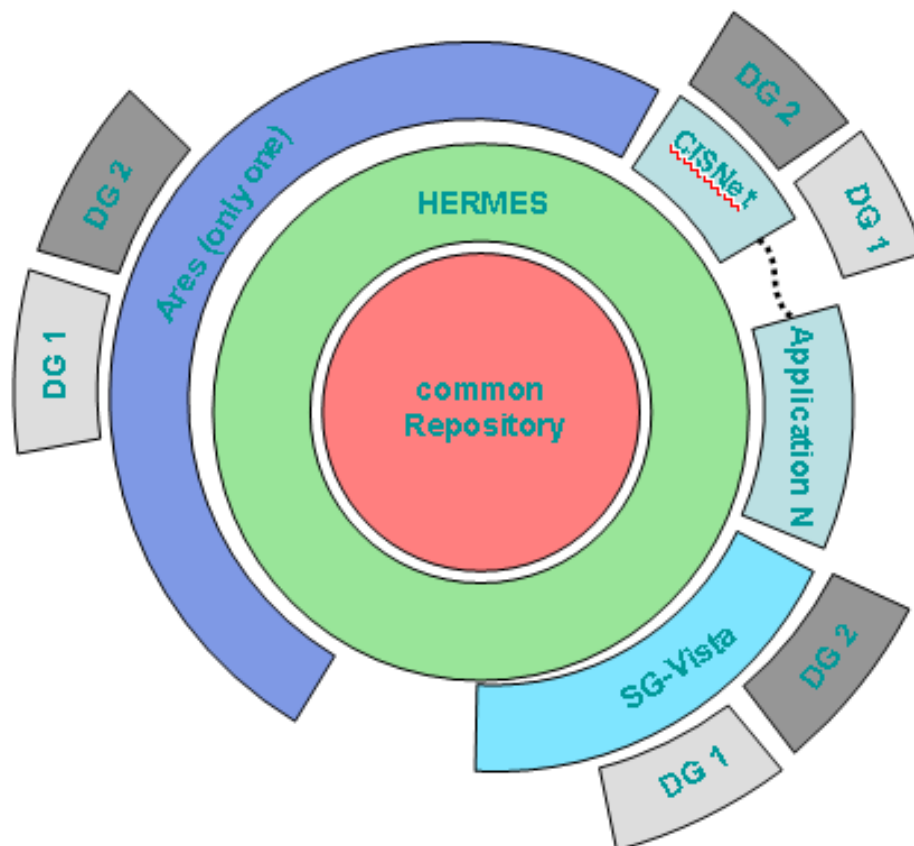
Commission Decision of 7 July 2004 amending its Rules of Procedure (2004/563/EC, Euratom) – Annex: Commission provisions on electronic and digitised documents – OJ L 251, 27.7.2004, p. 9.

³ Implementing rules of Decision 2002/47, namely SEC(2003)349/1, SEC(2003)349/2, SEC(2003)903, SEC(2007)734 and SEC(2007)970
Implementing rules of Decision 2004/563, namely SEC(2005)1578.

⁴ For more details about NOMCOM, please check 'NOMCOM User Guide'.

 **With ARES, all the Commission departments are using the same version of the new application and the same common electronic repository.** It is then possible to share a document between several DGs or services. This does not mean that everyone has access to everything, as there will be a system for managing access rights to metadata, documents and files which are restricted for obvious reasons (documents with markings) or to protect personal data (for example, confidential medical data, disciplinary proceedings).

Hermes has not been created to be used only with ARES and NOMCOM 3, but is also intended to be the platform to host any new application capable of providing document management services. From now on, the content of an attachment may be accessed by any department (provided it has access rights), regardless of the application that manages the data contained therein.



As mentioned above, NOMCOM is the application developed for centrally managing the Commission's filing plan and file metadata. This application makes it possible to manage:

- **the filing plan**, which is made up of several heading levels; these headings represent the Commission's activities;

- **the lists of files**, attached to the terminal headings of the filing plan; these files represent the departments' activities;

The application provides for different types of access, depending on the user's role: consultation, management of the common nomenclature, management of a department's headings, management of a department's or unit's files, creation of users and management of their rights.

ARES automatically launches access to NOMCOM 3 when required: for example, to consult the headings of a DG.

0.1. Registration

The concept of 'registration' is very important in document management at the Commission⁵. This operation, which establishes the document's importance to the institution and gives it an official character, is the first stage in the document's life cycle. Registration is then followed by the other life-cycle operations, such as filing (connecting the document to a file), storing, sorting and, depending on its value, either getting rid of the document/file or transferring it to the Commission's historical archives.

Before you register a document, you should analyse it to determine whether it meets the criteria for document registration⁶, i.e.:

- Has the document been formally drawn up or received in the course of my department's activities?
- Does it require action, follow-up or a reply from my department?
- Does it contain important information?
- Does the document contain important information that is not short-lived?

This analysis is performed by the person responsible for the case the document is related to (if necessary after consulting his or her hierarchical superior).

The analysis covers both the content and the context of a document received or produced within a department in order to determine whether or not it should be officially registered.

- documents that the department must keep because they contain important information, require follow-up or action on the part of that department or another Commission

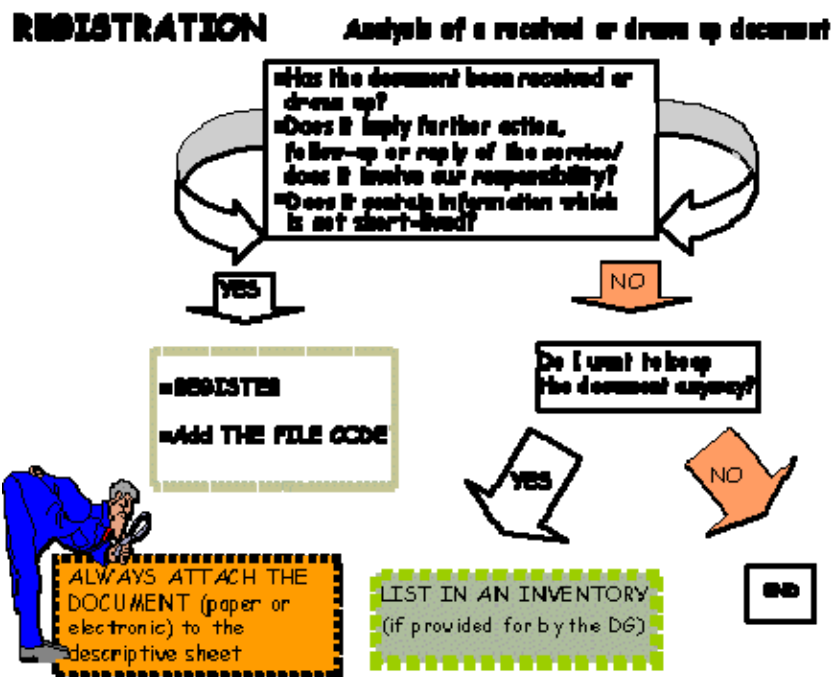
⁵ This concept is called 'enregistrement' in French and should not be confused with the 'enregistrer' function in French versions of office applications, which is the 'save' function in English versions.

⁶ Defined in point 4.2.1 of the Registration Manual, which can be consulted on the e-Domec site: https://myintracomm.ec.europa.eu/corp/sg/en/edomec/doc_management/Documents/edomec_inshort_en.pdf

department, have been endorsed and signed by the person responsible **must be registered** and will form part of an official file.

- documents that do not have to be kept in order for the file to be considered complete and valid **must not be registered**. However, these documents, if they are useful for understanding the file, may be 'saved' in the application.

In other words, any document that commits the Commission or one of its departments within the scope of its activities must be registered. Any document which shows the 'what', 'when', 'how', 'why' and 'by whom' of any decision made.



For more information on registration, see the reference documents on the e-Domec website⁷.

0.2. Filing: the central concept of 'file'

Filing is an intellectual operation that involves linking a document or group of documents with a specific action connected with a department activity. The documents reflect our daily work and filing allows a link to be created between each document and the specific case to which it relates. In other words, filing is putting a document into context.

Filing should not be confused with storage (physically arranging documents, e.g. in a cupboard, importing an attachment into Ares). In Ares, filing is the action of assigning a file

⁷ <https://myintracomm.ec.europa.eu/corp/sg/en/edomec/Pages/intro.aspx>

code on the document sheet (thus indicating the relation between the document and its case: the file). Storing is the action of scanning (or importing) a document so that it exists in the Ares database.

Files are in fact a key element IN good document management, they are the real work-tools of the Commission⁸.

Documents are drawn up or received within the context of a case.

To make it easier to manage all the documents pertaining to a given case, they must be grouped together in the same **file**.

To make it easier to find electronic files, they are filed by activity in the relevant heading of the **filing plan**.

The list of files is becoming a vital management tool as it provides an inventory of the files created and in the possession of the Commission.

0.3. Preserving documents

The length of time for which documents must be kept depends on their category (financial, human resources, etc.).

When creating a file, the creator must indicate the file category in accordance with the typology set out in the common retention list (CRL⁹). ARES system will automatically ensure that the document, once closed, will be preserved for as long as necessary. At the same time, a permanent copy (in PDF format, for example) will be made of each document in the database to guarantee that it can be read in the long term.

0.4. Protection of personal data

Regulation (EC) No 45/2001 of the European Parliament and of the Council has been in force since 1 February 2001. This Regulation on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies concerns all Commission officials and external entities ('natural persons'):

- from the point of view of their individual rights, when their personal data is processed by the institution;
- and from the point of view of their obligations, when they process personal data in the context of their professional activities in the service of the institution.

⁸ 'Document and file management at the European Commission', ADMIN A3 Training Unit, 2006

⁹ List of categories: SEC(2012)713:
https://myintracomm.ec.europa.eu/corp/sg/en/edomec/legal/Documents/2012_crl_rev1_table_en.pdf

Basically, it concerns all processing of personal data by the institutions and Community bodies for activities all or part of which fall within the scope of Community law.

The principle of personal data protection provides that the data should be:

- processed fairly and lawfully;
- processed for specific and explicit purposes;
- appropriate, relevant and not excessive;
- accurate;
- kept for no longer than necessary;
- processed in accordance with the rights of the person concerned;
- processed in a safe and secure manner;
- transferred to third parties by taking the appropriate precautions.

Moreover, the person whose personal data is processed has a certain number of rights, including the right to be informed of the nature and purpose of the processing of his data and the identity of the person processing it, the right to demand that incorrect data be corrected and, in certain circumstances, the right to oppose the processing of his data.

The main objective of Ares application is to register all documents drawn up or received by the Commission within the scope of its activities, which are likely to require action, follow-up or a reply from the Commission or which contain important information that is not short-lived. The purpose of the registration is to enable such document to be identified with certainty. In order for a document to be identified with certainty, certain 'metadata' has to be encoded for it, such as the sender, the recipient, the title as well as the link between the metadata and the content (physical attachment).

Personal data is likely to be found at the following levels:

- Identification of the sender¹⁰. creating a list of these entities;
- Identification of the recipient¹¹ creating a list of these entities;
- Title of mail (may contain private data)
- Content (attachments)

¹⁰ Provided that the sender is a natural person and not a legal person. In fact, legal persons are not affected.

¹¹ Provided that the recipient is a natural person and not a legal person. In fact, legal persons are not affected.

0.5. ARES Terminology

Term in FR	Term in EN	Definition	Adonis equivalent
Document	Document	In HERMES, a document is the combination of one or several attachments and the metadata of the document in question.	Descriptive sheet + documents attached
Fichier	Attachment	In HERMES, an electronic file (.xls, .doc, .pdf, etc.), which, linked to a set of metadata (and possibly other items), makes up a document.	Document (attached)
Codes action	Action codes	Code indicating an action expected to be performed by an individual or department on a given document	Assignment codes
Métadonnées	Metadata	Data describing the context, contents and structure of documents and their management over time, as determined by the implementing rules for the application of the provisions on document management and to be supplemented by the implementing rules for the application of these provisions.	Sheet

0.6. Common repository



In ARES, all users use the same electronic common repository, whatever service they work for (the Commission, EEAS, an executive agency or a delegation). This way, it is possible to share a document between several DGs or services, which does not mean that everybody has access to everything. The storage of documents in a central repository is independent of how they are handled. This avoids any duplication and facilitates the sharing of information when necessary.

0.7. Access rights and security

0.7.1. Groups and roles

Hermes platform has a very large number of users and many operations to be executed. In the context of Hermes, Ares and NOMCOM 3, users need to be able to access certain documents and files and to perform certain operations on them. However, it must not be possible for everyone to access everything. The system should facilitate access control management and thus permit a limited number of specific users (administrators) to assign access rights for documents and files to endusers. Users will be assigned the rights to perform these operations in Ares.

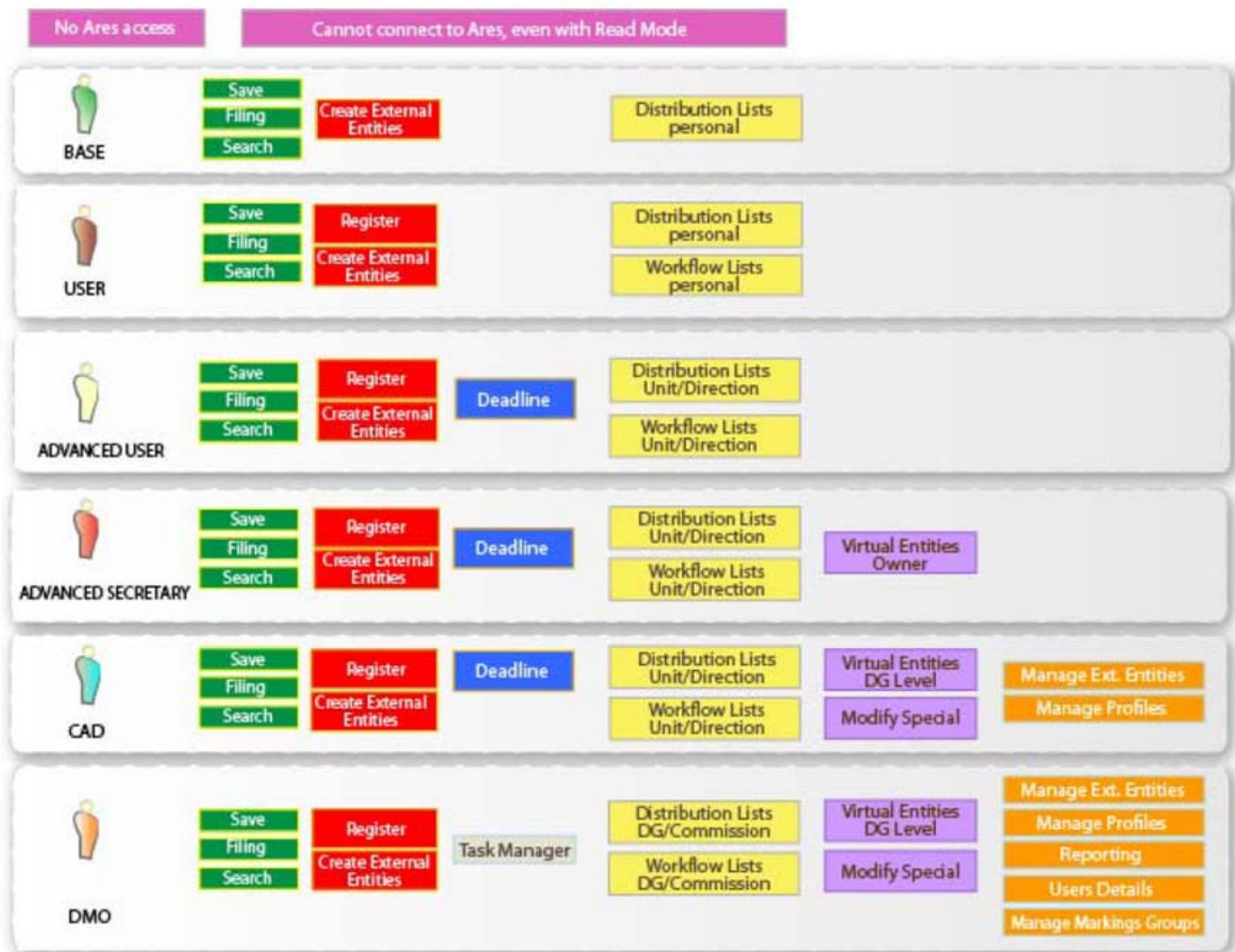


Under Hermes/Ares/NOMCOM 3, users are sorted into 'groups'. These groups may be created for operational (IRM, heads of unit, etc.) or organisational reasons (SG.B.3, DIGIT.B, etc.). A user may belong to several groups.

The users and organisational groups appear by default in Ares. They are managed in the application by automatically importing from systems such as Sysper 2 or ComRef. The operational groups are managed manually.

An 'operation' represents an action to be performed in Ares, such as the action of modifying a saved document by clicking on <Modify> or creating a distribution list which the whole department can view.

All the various sets of operations available in Ares are called 'roles'. A role determines one or more operations that the users can perform. Ares uses 'profiles', which group together a set of pre-defined roles. Working with profiles eliminates the need to add access authorisations one by one. See below a summary of all Ares available profiles:



To read the summary: the person with the profile '**advanced user**' is able to perform the following actions: save and register a document, file, search, create external entities, create distribution and workflow lists (at unit and direction level) and visualize the deadline.

The fact that there is an option for managing operational groups means that rights can be assigned on a '**need to know**' basis, i.e. the people directly concerned by a case must always be able to access the document in question. (Once a user has been given access to a document, he will retain this access.)

At Commission level, one or more users with the role of '**supermanager**' are responsible for central management (and in particular, for defining which operations are associated with the roles) and assigning the '**DMO**' profile to the designated users in each DG.

0.7.2. Operating principles

The rights to access documents and operations are managed according to the following principles:

- **When a document is saved in the system** (in the case of a document which is still in preparation), **it can then be accessed only by its creator** (author of the document).
- **If a document saved by a creator undergoes a workflow** (assignment or e-Signatory), **the document will then be accessible only to its creator and the workflow participants**, depending on what stage the document is at (in the case of an e-Signatory).
- **As soon as a document is registered, it becomes visible** (accessible on a read-only basis) **to the 'stakeholders'**, i.e. to **all the parties involved**: creator, participants, sender(s) and recipient(s).
- As soon as a document is filed in a file and the document is registered or saved, access to the document is extended to all the persons who have *File Reader* authorisation for this file. **It is the filing functionality that determines extended visibility for the document.**

In this context, SG recommends that the default visibility for files should be **DG visibility**.

To restrict access to certain documents, these documents must simply be filed in a 'restricted' type file which only a pre-defined group of users can access.

Care must be taken to determine which files will have DG visibility and which files will have 'restricted' visibility (as well as the associated *File Reader* authorisations).

- **If, following several operations, two groups of users may receive access rights to a given document, both groups retain this access.**

In other words, user union, as opposed to intersection, applies. The meaning of this principle is as follows:

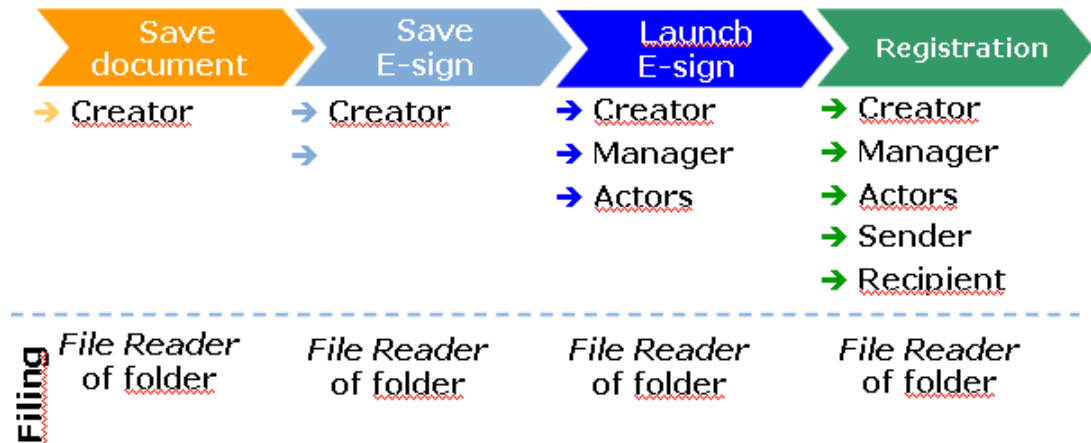
a) If a document is filed in two files accessible to two different groups of users, the two groups can access the document.

b) Let us suppose that a document is filed in a file accessible only to one group of people and that one of these people puts the document into an e-Signatory process with other users who do not have access to the file. These people will then be able to access the document (otherwise there would be no point in e-Signatory).

c) When a document is sent via Ares, the recipients will have access to the document even if they cannot access the file where the document is filed.

- **Summary diagram**

Lifecycle of Document with E-signatory



! **Basing access rights on files rather than on documents** is consistent with the e-Domec document policy. **Remember that the file is at the heart of the archiving policy and that every document registered must be filed as soon as possible.** In order to preserve DG visibility, **it is highly recommended that the document be filed immediately after its registration or, failing that, within a maximum of five working days.** Saved documents may be filed if their author wishes this.

0.7.3. *The basic operations*

All Ares users can perform a whole series of general and specific actions (operations) on the documents to which they have access.

By default, every user has access to the following operations:

- Creating and saving a document
- Modifying a saved document to which they have access
- Managing their own distribution lists and workflow models (at 'Personal' level)
- Performing searches (simple, advanced, full text, etc.) The results will only include the documents to which they have read-only access on
- Consulting/performing/searching the tasks that have been assigned to them
- Adding attributes to a document to which they have access
- Adding/Modifying/Deleting the e-signatories on a document to which they have access
- Adding external entities

- Adding links between documents to which they have access
- Filing a document to which they have access in a file for which they have filing authorisation
- Removing a document to which they have access in a file for which they have removal authorisation
- Adding or removing files to or from their favourites (they must have access to the files)
- Managing their Ares preferences
- Consulting the parts of the filing plan to which they have access
- Checking in/out documents for which they are included in the e-Signatory
- Putting a 'marking' on a saved document to which they have access
- Consulting NOMCOM



A user's access has to be modified before the user can perform additional tasks in Ares. The user has to be assigned to the necessary roles or profiles to authorise him to perform the desired operations.

At DG level, access will be managed locally by the person with 'DMO' profile in the **Administration** module.

0.7.4. Access rights and main roles for headings, files and documents

Each type of access right (on headings, files or documents) includes subordinate rights. (For example, a *Heading Editor* automatically receives the rights of *Heading Editor*, *File Creator* and *Heading Reader* for headings. Similarly, for documents, a user with 'Write' access will also have 'Read' access and 'Version' access.)

- **Main roles for headings:**

Roles	Description
<i>Heading Editor</i>	The user may modify a heading, its metadata, its access rights and may create subheadings.
<i>File Creator</i>	The user may create files under the heading but may not modify the heading. He will be the ' <i>File Editor</i> ' of the files created.


<i>Heading Reader</i>	The user may know of the existence of the heading and know its metadata but may not create files under the heading.
<i>None</i>	The user does not know of the existence of the heading.

- **Main roles for files:**

Roles	Description
<i>File Editor</i>	The user may modify the metadata of the file, its access rights and may also create sub-files. He does not see the documents filed.
<i>File User</i>	The user may see and file documents in the file but may not modify the file.
<i>File Reader</i>	The user may know of the existence of the file and access its content but may not file documents.
<i>None</i>	The user is nt aware of the existence of the file.

- **Document access rights:**

Rights	Description
<i>Write</i>	The user may modify the metadata and the content of the current version of the document (e.g. participants in an e-Signatory for documents).
<i>Version</i>	The user may modify the metadata and the content but only by creating a new version of the document (e.g. participants in an E-Signatory for attachments).
<i>Read</i>	The user may see the content of the document but may not update it (e.g. <i>File Reader</i> of the files where the document is filed).
<i>None</i>	The user is nt aware of the existence of the document.

-  *File Reader* role for a file automatically confers *Read* access to the documents filed in that file (except those with 'markings' for which the reader does not have access).
- All profiles, except '*base*' and '*noAresaccess*' are able to register documents. This role may be useful in DGs where only a few people are authorised to register documents.
- So that they are aware of the existence of all the headings of the filing plan, all Commission users will automatically have *Heading Reader* access to all the headings of the filing plan.

- **Summary table:**

Main operations	Result of the rights available
SAVE (saving a document without registration)	The document creator can modify the document saved. The rest of the users do not know of the existence of the document.
REGISTER (registering a document)	The creator and any workflow may read the registered document but no longer modify it. The sender and the recipients can see the document. In other words, all the stakeholders can see the document.
FILE (filing a document)	The <i>Filing users</i> can file documents in this file. The <i>File Reader</i> can see the the document.
ASSIGNMENT (workflow)	The participants can see the the document.
E-SIGNATORY (workflow)	For the attachment , the e-Signatory participants can modify the document: modification by creating a new version of the attachment, doing a version of the previous participant in the workflow or deleting their own version. They can see the following versions of attachments. With regard to the document , the participants of the workflow: - for the current task: can see and modify the document

	- for the other tasks: can see the document
File creation	The <i>File Creator</i> can modify the metadata of the file, its access rights, file documents and also create sub-files there.
File closure	All users can see the file but may not file documents there.
Access rights cumulation	If, following several operations, two groups of users may receive access rights to a given document, both groups retain access. User union (OR), as opposed to intersection (AND), applies.

(NB: *Italics*: Roles / **CAPITAL LETTERS**: Operations)

See also

Visibility and Marking

0.7.5. *Document access control: locking system*

Document access control was created in the application in order to avoid a situation where several users try simultaneously to modify the metadata of a document. Thus, a check is automatically carried out for every document to ensure that no other user is in the process of modifying data on any of the document's tab pages. This control is made before executing an operation on the document and/or the attachment and after the user has finished a task or an action on the document and/or the attachment.

A document is automatically locked during:

- modification of the metadata on the *Document* tab page (click on the <Modify> pushbutton)
- editing of the assignments or of the e-Signatory (click on the <Edit Assignments> or <Edit E-Signatory> pushbutton)
- filing of the document
- execution of the versions of the attachments (via 'check-in check-out')
- execution of the tasks (assignment, e-Signatory)

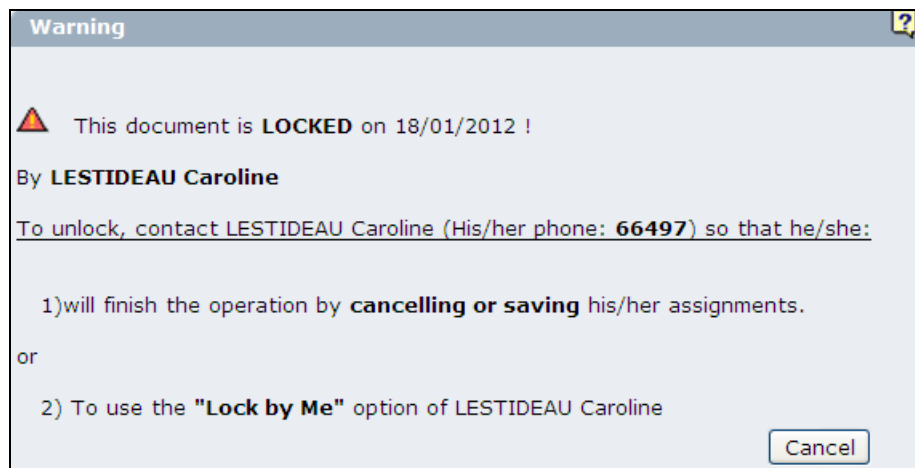


The document is automatically unlocked when the user completes an action. Care must be taken to ensure that the action has been properly closed and validated so that the document does not accidentally remain locked.

To prevent any kind of lock:

- Confirm the metadata changes ('Document' tab page) by clicking on <Save>, <Save>, <Register and Send> or <Cancel>
- Close the editing of the assignments or of the e-Signatory by cancelling the editing (click on the <Cancel Assignments> or <Cancel E-Signatory> pushbutton) or by validating the editing (click on <Save and Launch> or <Save E-Signatory>)
- Close an action on the versions of the attachments: finalise the check-out by performing a check-in or cancellation operation

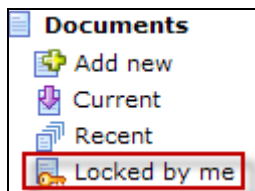
A warning message appears when the document is already locked by another user:




This person or a system administrator must then be contacted so that (s)he can release the document.


To release a document you would have locked:

- In the left menu, click on 'Locked by me' in the '*Documents*' sub-menu .

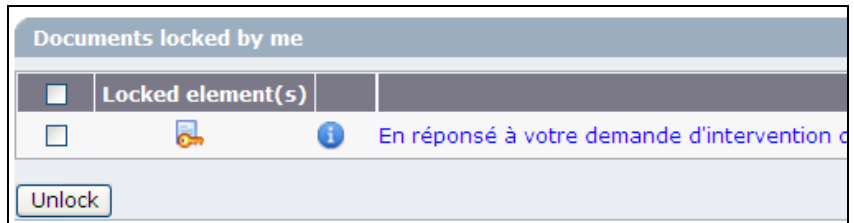


The system will then show you the list of locked document(s) or locked attachment(s). Select the document to unlock.

The  icon means that a document has been locked.

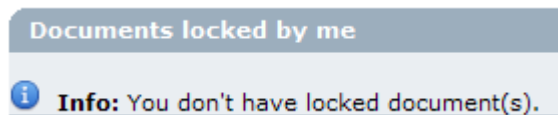
The  icon means that an attachment has been locked.

Press the <Unlock> button



Note

An informative message is displayed when you have no locked document:



See also

Filing from Favourite Files

Filing from Search Existing Files

Filing from the filing plan

Modifying a saved document

Managing assignments tasks

Entering e-Signatory data

0.8. Important links

The E-domec site:

<http://myintracomm.ec.europa.eu/corp/sg/fr/edomec/Pages/intro.aspx>

Registration:

What documents must be registered or simply saved?

- The implementing rules for 'Registration': http://www.cc.cec/sg_vista/cgi-bin/repository/getdoc/COMM_PDF_SEC_2003_0349_1_EN_VOL1.pdf
- The registration manual: https://myintracomm.ec.europa.eu/corp/sg/fr/edomec/doc_management/Documents/edomec_inshort_fr.pdf
- Registration of e-mail: http://www.cc.cec/sg_vista/cgi-bin/repository/getdoc/COMM_PDF_SEC_2006_0353_1_EN_NOTE_ET_ANNEXE.pdf

E-Signatory:

- Implementing roles for electronic documents: http://www.cc.cec/sg_vista/cgi-bin/repository/getdoc/COMM_PDF_SEC_2005_1578_1_EN.pdf

Filing:

- The implementing rules for 'Filing': http://www.cc.cec/sg_vista/cgi-bin/repository/getdoc/COMM_PDF_SEC_2003_0349_1_EN_VOL2.pdf
- Common retention list: http://www.cc.cec/home/dgserve/sg/i/edomec/pages/lcc_table_en.htm

Retention:

- The implementing rules for 'Retention': http://www.cc.cec/sg_vista/cgi-bin/repository/getdoc/COMM_PDF_SEC_2007_0734_1_EN.pdf
- Common retention list: https://myintracomm.ec.europa.eu/corp/sg/fr/edomec/legal/Documents/2012_crl_rev1_table_fr.pdf

1. MODULE 1: WORKING ENVIRONMENT

1.1. Description of Ares and its main functionalities

Ares makes it possible to manage:

- the saving and registration of incoming, outgoing and internal mail and documents
- the filing of documents
- the document processing circuit
 - assigning and creating tasks,
 - scheduling tasks,
 - delegating tasks and possibly returning them to those who have assigned them,
 - replying to a document,
 - closing tasks,
 - e-Signatory,
 - links between documents.
- the search function
- scanning, printing of dividers

1.2. Web navigator: Connecting to Ares

Context

Ares has a web-type user interface. You can access Ares via the Commission intranet with your ECAS login.

Method

- (1) Launch Internet Explorer
- (2) Enter the address <http://www.cc.cec/Ares>

(3) The ECAS homepage asks for authentication:

European Commission
European Commission Authentication Service (ECAS)

Intracomm > Authentication Service > Login

Login New password Sign Up Help

ECAS

(authenticates your identity on European Commission websites)

ares
requires you to authenticate

Login [Not registered yet](#)

Is the selected domain correct?
European Commission [Change it](#)

Username or e-mail address *

Password * [Lost your password?](#)

More options...

Login!

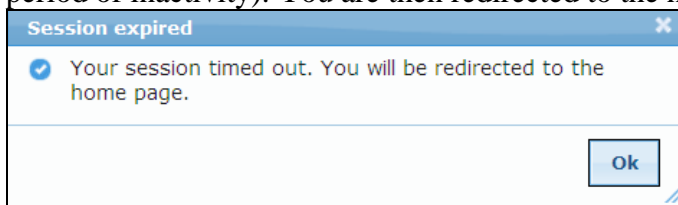
* Required fields

(4) Enter your *User name* and *Password*.

(5) Click on <Login!>

Notes

- Your login and password are your ECAS user and password.
- If you are already authenticated on ECAS after accessing another application that uses this service, you will not be asked to authenticate yourself again.
- You can access Ares remotely. Details here:
<https://webgate.ec.europa.eu/fpfis/wikis/display/Ares/Ares+remote+access>
- A warning message is displayed when the current session has expired (for example after a period of inactivity). You are then redirected to the home page after ECAS authentication:



- When you connect to Ares, you have to use the complete Ares URL given above. If you need an Ares shortcut, please check that the URL you are using is the proper one. Indeed,

when you use the right shortcut to Ares you are first led to a system which will forward you to a one of the different Ares servers depending on the server loads and maintenance (sometimes, some of them are stopped for maintenance). If you use your bookmark (assuming it's not pointing to <http://www.cc.cec/Ares> which is the correct URL), you will directly connect to the server you were connected to when you created your bookmark without passing through this load balancing system..The consequences might be that you cannot connect to Ares (because the name of the server mentioned in your bookmark is actually down for maintenance) or Ares is really slow (because too many people are already using this server).

Always do one of the following tips to avoid this issue:

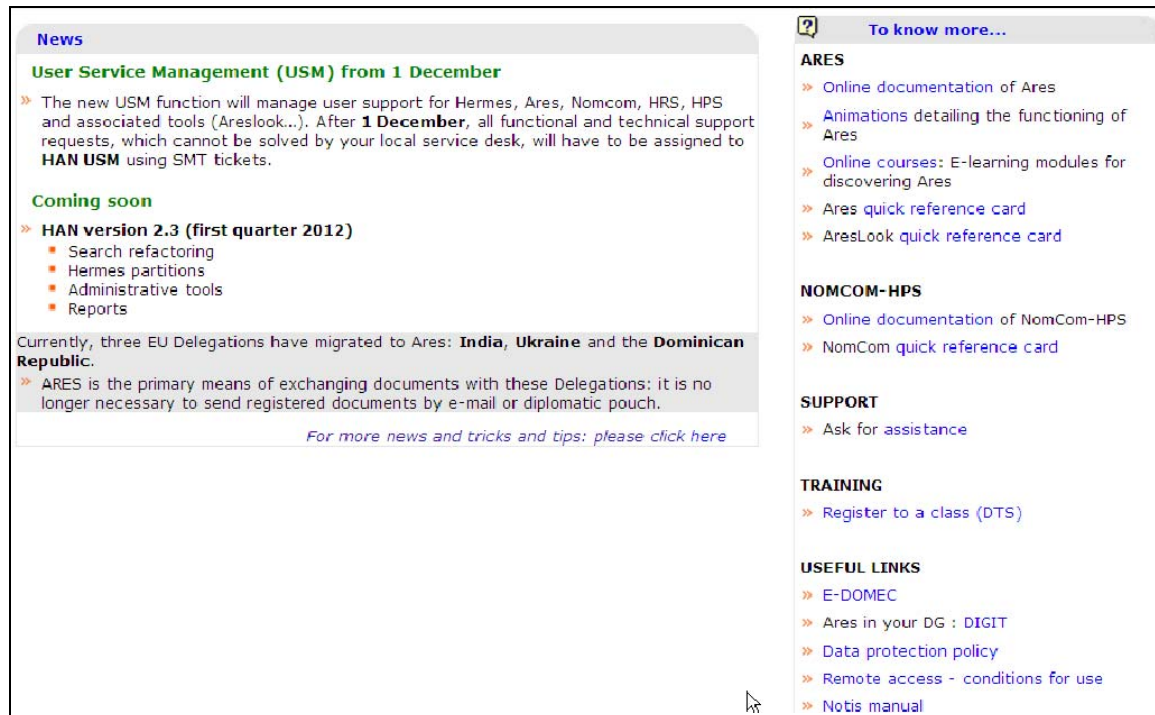
- Use your local helpdesk (or DMO team) shortcut on your desktop (or start menu) if it exists.
- Type it yourself in the address bar of Internet Explorer: <http://www.cc.cec/Ares>
- Check the bookmark you have created for Ares leads to <http://www.cc.cec/Ares>. Please modify it if necessary.

1.3. Homepage and tree view

Context

The Ares screen is composed of a menu (information area and its tree view) and the work screen (working area).

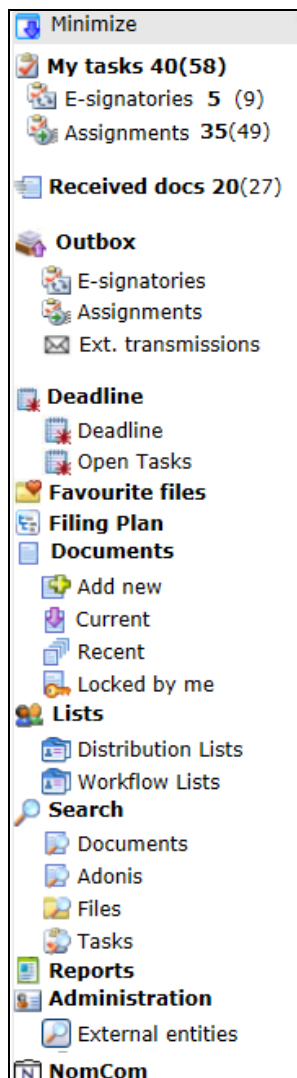
The work screen and the homepage offer different links and shortcuts:



- *News*: information about the migrating delegations, the new Ares releases and patches, as well as advice on how to use Ares.
- *To know more*: Links to the documentation, contacts or other useful Ares-related sites.

The menu (tree view) allows you to navigate easily and directly between the different Ares functionalities. It can be minimised, if necessary, by clicking on <Minimise>¹². The menu gives you access to the following information:

¹² Click on the button again to 'maximise' the menu.



The various tasks that are assigned to you or that you have assigned to other people are listed in the **My tasks** menu

In **Received docs** are displayed all the registered documents where you are indicated as recipient.

In **Outbox** are displayed all set tasks, as well as the 30 last external transmissions you have done.

The **Deadline**¹³ menu displays all non closed tasks assigned to the users from your unit / direction or DG.

The **Favourite Files** menu allows you to manage your files and add documents directly from the relevant file.

The **Filing Plan** offers a direct access to the filing plan (you can view headings/files and documents, you are offered a direct link to NomCom to directly open the concerned elements...)

The **Documents** menu allows you to work from the document concept and to access all the related metadata. You can create a new document, access the last document opened or the list of last documents processed or received.

The **Lists** menu allow you to manage your distribution lists (recipient list) and workflow list (tasks recipient)

The **Search** menu gives you access to the detailed search for documents, files or tasks.

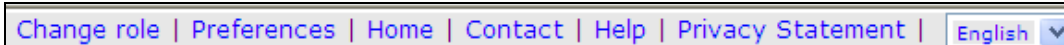
Reports offers you the list of available reports (according to your rights).

The menu **Administration** is available only if your profile requires administration tasks (see manual for administrators).

The **NomCom** menu provides direct access to the NOMCOM 3 application.

¹³ This fonctionnalité is only available, so viewable to 'Advanced Secretary', 'CAD' and 'Advanced User' profiles

On the top right you see several hyperlinks which are available on every Ares screen:



- <Change role>: allows you to connect as a virtual entity or under the profile of somebody who would have given you his/her delegation.
- <Preferences> allows you to define your personal options, such as language of the application, start page, delegation choices and even the Adonis/Ares parameters.
- <Home> takes you back to the site homepage.
- <Contact> offers you a form to be completed online in the event of any problems/questions concerning the application. You also have a direct link to the functional mailboxes of the support teams.
- <Help> gives you access to Ares online manual (pdf version).
- <Privacy statement> opens Ares and NomCom privacy statement (gathered information, spread data and so on).
- The *French/English* dropdown list allows you to quickly set and change the interface language for the current session.

Note

If you click on the Ares logo (on the top left of each screen) you are redirected automatically to the application homepage.



See also

Preferences

Web navigator: Connecting to Ares

1.4. Preferences

Context

All users can configure their personal preferences (for display language, Adonis properties, favourite files display, etc.) as well as their delegation. Ares allows you to choose another person, or several people to work on your behalf in Ares. You can also decide to have them receive directly your tasks.



When your delegate connects to Ares on your behalf, he cannot access the 'preferences' menu of your profile. Delegation does not allow the other person to modify your preferences.

1.4.1. The Main tab page

Method

- (1) Click on **Preferences** at the top right of any screen.
- (2) This automatically takes you to the main tab that will help you to configure the main Ares options.
- (3) First you can settle your '*main options*':

The screenshot shows the 'Main' configuration tab. It has four sub-tabs: 'Main' (active), 'User Delegation', 'Task Delegation', and 'NOTIS'. Under 'Main options', there are five settings: 'Language' set to 'French', 'Start Page' set to 'Home', 'Adonis login' (empty), 'Adonis password' (empty), and 'Adonis DG database' (empty dropdown). Under 'File Options', there are three settings: 'Grouping' set to 'Group by heading decimalisation', 'File sort' set to 'Sort by file title', and 'Document sort' set to 'Sort by document registration date'. A 'Save' button is located at the bottom left of the form.

- (a) *Language*: language of the application when connecting to Ares (*French* or *English*)
- (b) *Start page*: homepage selected automatically on connection

The following parameters are required to perform an integrated search of Ares/Adonis:

- (a) *Adonis username*: login used for Adonis (upper case compulsory)
- (b) *Adonis password*: password used for Adonis
- (c) *Adonis DG Database*: name of the DG to which you have access for your Adonis/Ares search. (You must enter a valid username and password before you can select a DG).

- (4) Under '*File options*' you can customize the display of your favourite files:
 - (a) 'Grouping': the files may be gathered by heading decimalisation, specific codes, file owner or desk officer
 - (b) 'File sort': the files may be sorted by file title, specific code, file owner or desk officer.
 - (c) 'Document sort': the documents may be sorted by registration date, creation date, registration number or save number.

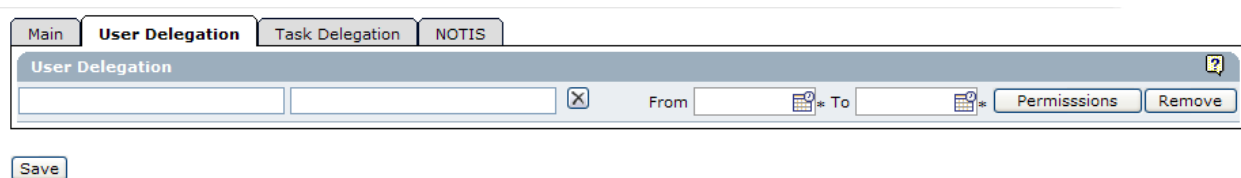
(Please note that the sorting/grouping can be chosen directly from the ***Favourite files*** menu)

- (5) Click on <Save> to confirm your selection.


1.4.2. '*User delegation*' tab

Method

- (1) Click on ***Preferences*** at the top right of any screen.
- (2) Click on the tab '*User delegation*':



This tab enables you to delegate your full profile in Ares. You can fully or partially delegate all you can see in Ares (documents, tasks, received documents, etc.) as well as all you can do (your delegates can then create documents on your behalf). You can define several delegates, either individuals or virtual entities.

- (3) In the first field, type the name of your delegate using AutoComplete (either a person or a virtual entity). The service will be then completed automatically.
- (4) You must then specify the period of delegation in the fields '*From*' and '*to*': complete the two date fields corresponding to this period by entering them manually (DD/MM/YYYY) or by clicking on the calendar icon  to access an interactive calendar pop-up. A double-click in that field defines the current date. (Mandatory fields).



Delegation start date cannot be set in the past, i.e. prior to today's date. The system will never validate a delegation that starts before the day when you put the delegation's parameters. (Then, if you modify an ongoing delegation, you will be requested to put at least today's date as 'start of the delegation', even if the delegation has been started for a few days/weeks...).

- (5) Click on the <Permissions> button to set the access permissions you wish to give to your delegates:

Ares - Permissions - Windows Internet Explorer

This delegate has the following permissions:

☐ Is allowed to delegate in cascade

Access to sensitive data

☐ May have access to documents with a level of sensitivity "Handling restriction"

☐ May have access to documents with a level of sensitivity "RESTREINT UE" or "EURA-Restricted"

☐ May have access to documents received as "Person Concerned"

Time limitation

May only have access to documents with creation dates superior or equal to 27/11/2013 (up to 3 months before the date of assignment to your current job)

Please do not forget to save the preferences after the changes

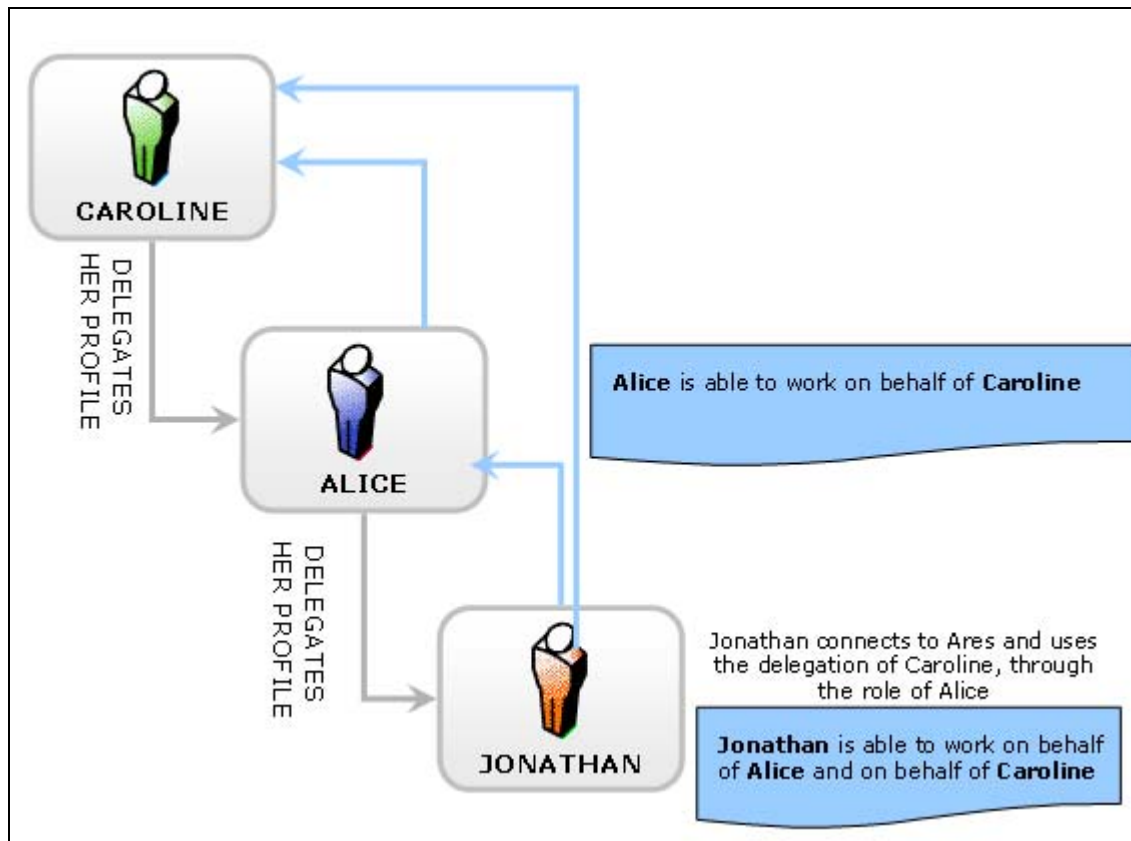
Ok Cancel

Callouts:

- Allow or not the delegation in cascade
- Allow or not the possibility to see sensitive documents
- Possibility to read personal documents

- '*Delegation in cascade*': you should tick this box if you wish to allow cascading delegation. This means that if the person to whom you have delegated your Ares has also introduced his/her own delegation to a third person, the latter will have access to your Ares profile. Caroline delegates to Alice, for example, and selects 'Delegation in cascade'. Alice delegates to Jonathan. When Jonathan connects to Ares, he is able to connect on behalf of Alice and on behalf of Caroline, even if Caroline has not specified a direct delegation.

You should tick the box if you wish the cascading delegation to take effect.



- '**Access to sensitive data**': you can limit your delegates' access to some documents.

'May have access to documents with a level of sensitivity *'Handling restriction*': when this box is ticked, your delegates can see your documents with a sensitivity level 'handling restriction'

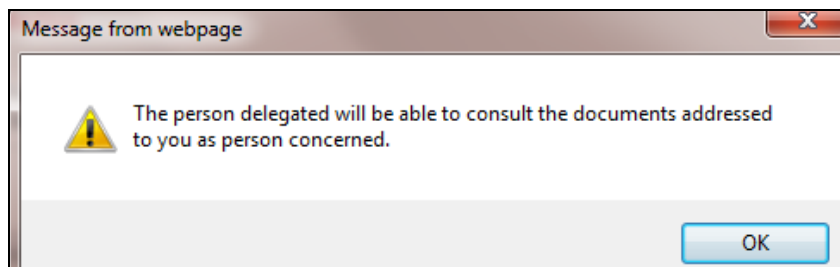
'May have access to documents with a level of sensitivity *'Restreint EU*': when this box is ticked, your delegates can see your documents with a sensitivity level 'RESTREINT UE'

'May have access to documents received as *'Person Concerned*': your delegates have access to the documents with 'Person concerned' restriction ¹⁴




You can tick the third box only if you have ticked the two previous boxes. You will not be able to tick it if you have selected a delegation in cascade. A confirmation message is displayed when you tick that box:

¹⁴ 'Person concerned' detailed chapter 1.7.

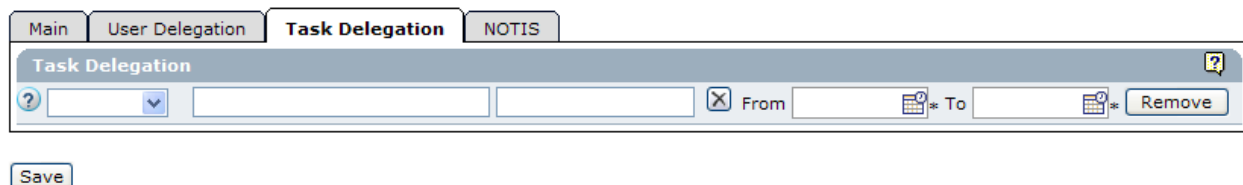


'Time limitation': delegation is useful for your current activities in your daily work: a delegate receives access to the documents whose creation date equals the start of the delegation. However you can authorise this type of access in your preferences, for the documents created during your current post: you may set a date up to **three months prior** to it. In order to define a date prior to the current date, please modify the 'date' field.

 **None of the boxes** is ticked by default: <Delegation in cascade> is then not chosen by default (except for specific cases in some DGs). Delegates with no access to documents bearing the sensitivity level 'handling restriction' and 'Restreint EU' do not have access to 'person concerned' documents or to documents that were created prior to the start of the period of delegation.

1.4.3. 'Task delegation' task

- (1) Click on **Preferences** at the top right of any screen.
- (2) Click on the **Task delegation** tab:




This tab enables you to delegate certain types of tasks, based on their action code, either to a person or to a virtual entity.

Thus, the specified tasks are automatically sent to the user you have delegated.

Action code: select the action code corresponding to the type of task you wish to delegate from the dropdown list

Delegate: type the name of the person (or the virtual entity) – using auto complete – to whom you wish to delegate the task.

From/To: enter the beginning and the end of the delegation. Type it manually (DD/MM/YYYY) or click on the calendar icon  to access an interactive calendar pop-up. (Mandatory data).

(3) Click on <Save> to confirm your selection.

1.4.4. 'Notis' tab

Notis is a notification service for systems such as Ares or Mips. It sends you notifications (through the NOTIS Desktop Alserter) when a new document or a new task arrives for you or for the persons whom you have the delegation or the virtual entities you belong to.

A blue icon at the bottom right of the task bar is always visible:



By default, none of the boxes is ticked. This means you do not receive notifications. If you do want to receive notifications and define your Ares Notis preferences, please fill in the <NOTIS Alert Options> tab:

Main	User Delegation	Task Delegation	NOTIS
NOTIS Alert Options			
Summary Report		<input checked="" type="checkbox"/>	One notification per day ▼
Task Notification		<input checked="" type="checkbox"/>	Include delegations <input type="checkbox"/>
Document Notification		<input checked="" type="checkbox"/>	Include delegations <input type="checkbox"/>
Deadline Report		<input checked="" type="checkbox"/>	1 ▼ day(s) before deadline
You can define other preferences directly in Notis.		Notis Preferences	
<div>Save</div>			

- 'Summary report': you can choose how often Notis summaries are sent to you – either once or twice a day. It offers a global view on all your tasks and on all the tasks of the people whom you have the delegation and the virtual entities you belong to.

For example, when I press <change role>, I have access to the following delegations and virtual entities:



My 'summary report' will be:

Sujet: Daily Summary Report									
Date: 02/02/2010									
De: Ares									
My Own		Active eSignatory Tasks	New eSignatory Tasks	Overdue eSignatory Tasks	Active Assignments Tasks	New Assignments Tasks	Overdue Assignments Tasks	New Documents	Read Documents
	DESCHAMPS Sylvie	3	0	1	22	12	10	11	18
My Virtual Entities		Active eSignatory Tasks	New eSignatory Tasks	Overdue eSignatory Tasks	Active Assignments Tasks	New Assignments Tasks	Overdue Assignments Tasks	New Documents	Read Documents
ve_digit.b.1.001		2	1	1	3	2	1	2	1
	FIORE Giovanni	3	1	0	32	22	0	16	3
	NYS Lionel	4	4	3	8	8	0	41	2
	LOPEZ LOPEZ Roberto	4	0	2	3	1	1	12	3
ve_dmo_grp		0	0	0	2	2	0	8	0
ve_krm10		0	0	0	1	1	0	5	0
ve_mutu		3	2	3	16	12	1	1	3
ve_sgb5		0	0	0	2	1	1	0	0
My Delegations		Active eSignatory Tasks	New eSignatory Tasks	Overdue eSignatory Tasks	Active Assignments Tasks	New Assignments Tasks	Overdue Assignments Tasks	New Documents	Read Documents
	CLAVERIE Marc	13	3	0	48	28	3	12	14

- 'Task Notification' if you tick this box, you will also receive a notification when you have received a new task.

Notis
Corporate Notification System

Bienvenue, deschay | Préférences | Aide

Dossiers

- Boîte de réception (1)
- Ares (1)
- Déléguées à Moi
- Déléguées aux Autres
- Poubelle

Boîte de réception Messages 1-4 de 4

Effacer Marquer comme lu Montrer Tout

<input type="checkbox"/>	Expéditeur	Délégation	Sujet	Date	Tâche	Exécuté par
<input type="checkbox"/>	Ares		Daily Summary Report	09/10/09 13:15		
<input type="checkbox"/>	Ares		Daily Summary Report	09/10/09 10:59		
<input type="checkbox"/>	Ares		New Task - sg.b.5(2009)268227	17/09/09 11:37	<input type="checkbox"/>	
<input type="checkbox"/>	Ares		New Document - sg.b.5(2009)269801	16/09/09 16:23	<input type="checkbox"/>	

Tout sélectionner Tout désélectionner Messages 1-4 de 4

Sujet: New Task - sg.b.5(2009)268227
Date: 17/09/2009
De: Ares

You received a new task: [My tasks](#)

Assigned to: DESCHAMPS Sylvie
Assigned by: SCOTTINI-TRUSSART Monique
Assigned on: 17/09/2009
Type: Assignment
Code: INFO
Deadline:
Instructions:

Title: [La conservation des dossiers au sein des DG. Elaboration des tableaux d'archivage et analyse des besoins en stockage externe](#)
Save number: sg.b.5(2009)268227
Registration number: Ares(2009)239329
Document date: 16/09/2009
Registration date: 16/09/2009

Effacer

- 'Document notification': if you tick this box, you will also receive a notification when a document arrives (i.e. the documents where you are defined as recipient).

Ares (1)

- Déléguées à Moi
- Déléguées aux Autres
- Poubelle

Boîte de réception Messages 1-4 de 4

Effacer Marquer comme lu Montrer Tout

<input type="checkbox"/>	Expéditeur	Délégation	Sujet	Date	Tâche	Exécuté par
<input type="checkbox"/>	Ares		Daily Summary Report	09/10/09 13:15		
<input type="checkbox"/>	Ares		Daily Summary Report	09/10/09 10:59		
<input type="checkbox"/>	Ares		New Task - sg.b.5(2009)268227	17/09/09 11:37	<input type="checkbox"/>	
<input type="checkbox"/>	Ares		New Document - sg.b.5(2009)269801	16/09/09 16:23	<input type="checkbox"/>	

Tout sélectionner Tout désélectionner Messages 1-4 de 4

Sujet: New Document - sg.b.5(2009)269801
Date: 16/09/2009
De: Ares

You received a new document: [My Documents](#)

Title: [Projet d'ordre du jour de la réunion du GIS-DMO du 22/09/2009 + Compte rendu de la réunion DMO du 06/05/2009](#)

Recipient(s): PULLANO Rino, RAMIS Pedro, CORDERROURE I CARBONELL Merce, SVENSSON Rickard, CRISTOBAL GONZALEZ Fernando, DELGRANGE Cécile, LIPMAN Marja, CARNEL Sven, CASTILLO GONZALEZ Antonio, JARRY Jean-Pierre, DUSSART-LEFRET Corinne, VAN DYCK Gustaaf, WETTACH Alain, BREY Daniele, MOLINEAUX Jean Francois, PAPADAKI Erianna, CLAVERIE Marc, BOUTE Fabienne, MICHELON Marco, REINIER Etienne, SCHWAB Nelly, DAMINI Andrea, GORNIACZYK Annka, GLYNN Paul, DERRUIE Eric, FUNARI Enzo, RUIZ HERRERA Roberto, DEL OLMO Maria Jose, VOSS Gabriele, LEVY CASTIEL Carlos, VANOSSEL-MONASSE Michele, PAGANONI Stefano, LANG Christa, VANROELEN Ann, MARCHANDISE Dominique, CUVEELE Patrick, GREMEL Thomas, NETENS Eddy, CASTELLO Paolo, BAUSSART Nicole, PAPALAMPROU Maria, BURGUEÑO FERNANDEZ Maria Del Carmen, HANCE-JALHAY Michele, AGNEESSENS Lydia, TARKA Agnieszka, SILVA CARDOSO Idalina, RIVIERES Muriel, KUMLIN Magnus, FEU JULIA Inmaculada, GUEBS Annick, BOTTON Isabelle, VAN ASBROECK Marc, PETITJEAN Patrice, MARTIN DE LA IGLESIA Virginia, MAUS ZARATE Virginia, FAVA Carmela, DEBOWSKA Beata, BUISMAN Nienke, STOIANOVA Veta, Garraud Catherine, Moncada Rosario, DEMPSEY Francis, CURRIE Susan, BATAILLE-GODICHAL Dominique, POOLEY Arthur, CAPORALE Diane, BAYOT Rebecca, ARNOLD-WOERTZ Brigitte, GOFFINON Carine, MEYER Daniel, CARTON Christine, JESSEN Anders, DEL POZO RELLO Maria Isabel, PASCUAL CARRASCO Concepcion, GALLEGO MORALES Meritxell, SEVELLEC Patrick, BOUCHERON-WEYL Doris, CERRO GINES Jesus, VEKEMANS Nicolas, O'CUILLEANAIN Nicholas, DESCHAMPS Sylvie, HANDLEY Peter, BECKERS Christina, SCOTTINI-TRUSSART Monique, ELORZA Aitor, LLINAS TERES Blanca, GODMAN Toby, VAN GREUNINGEN-SMITH Pauline, SCHRAM Jef, VANLAER Annemie, CIUREA Andreea, HALLIN Mattias, PICHON Eric, FISCHER Claudia, GRISIGNI Marco, MELIS Danielle, POIRET Monique, MORETON SANZ Inigo, MULLER Eric, TAJTI Timea

Sent by: SCOTTINI-TRUSSART Monique(SG.B.5)
Save number: sg.b.5(2009)269801
Registration number: Ares(2009)240485
Document date: 16/09/2009
Registration date: 16/09/2009
Comment(s):
File(s): projet OJ-2009-09-22.doc, compte-rendu plénière DMO 060509 .doc

Effacer

- *'Deadline report'*: here you can choose to receive a notification when a deadline is reached for any of your tasks. You can choose to receive the notification '1', '3' or '5' days before the final date.

The screenshot shows the Notis application interface. On the left is a 'Folders' pane with 'Inbox (11)', 'Ares (11)', 'Delegated to Me', 'Delegated to Others', and 'Trash'. The main area is titled 'Inbox' and shows a list of messages. The selected message is 'Deadline Report (5)' from 'Ares' dated '09/10/2009'. Below the message header is a table of tasks.

eSignatory					
Title/Subject	Task	Assigned by	Assigned on	Deadline	Instructions
ST-4 (e-sign launched - creator = mgr)	VISA	NYS Lionel (DIGIT.B.1)	12/08/2009	20/08/2009	

Assignments					
Title/Subject	Task	Assigned by	Assigned on	Deadline	Instructions
test lien	ASOC	CLAVERIE Marc (DIGIT.R.1)	12/08/2009	16/08/2009	
Jira versions to use	ASOC	DESCHAMPS Sylvie (DIGIT.B.1)	13/08/2009	17/08/2009	
Release 1.3.5.10_Bis deployed on HERMIVOLT	INFO	DESCHAMPS Sylvie (DIGIT.B.1)	13/08/2009	17/08/2009	
Test PDF rendition (Modify Special)	ASOC	DESCHAMPS Sylvie (DIGIT.B.1)	18/08/2009	20/08/2009	Veuillez suivre les instructions suivantes: gsg hqlih kusroghi sihrq lrrngijhi fdhjn kjdkg rhdh hhtgs hsthsth hstijy hsth sthjthtst hstjstj dfyjy

- *'Notis preferences'*: direct link to the Notis application where you can modify your general Notis parameters. For example, you can change the default parameter pop-up: the pop-up will then stay open, instead of closing after a few seconds. ('autoclose popup alert' option). It is also possible to receive notifications via Notis only or via Notis and Outlook. (Click on 'Preferences' then modify the 'Notification channels'):

Notis corporate Notification System

Welcome, Emilie KACI | Preferences

Your NOTIS preferences

Mark as read period: Never

Language: English

Filter: All

Folder: Inbox

Sort column: Date

Sort order: Ascending

Notification channels:

Notis	Notis & Mail
Ares	Notis & Mail

Save Cancel Reset

Notes

- ⚠ When you specify a profile (user) delegation, you will still have access to the delegated tasks in your **Tasks** menu. When you choose a task delegation, however, the task which was in your name will be closed automatically and a new task (with the same action code) will be generated for the person in receipt of your delegation.
- When you are preparing a task delegation, you cannot put two different persons for the same action code and for the same period. If so a warning message prevents you from saving:

Overlapping date intervals for ATT_ASOC task code : 10/15/09 12:00 AM and 10/15/09 12:00 AM

- The icon next to some fields allows you to delete the value in those fields.
- Clicking on the icon displays the complete name of the corresponding action code.
- You can set up several delegations for different action codes.
- ⚠ The delegation introduced via 'Preferences' will automatically affect all incoming tasks that correspond to your chosen criteria. If you receive a task which you wish to delegate manually, use the <Delegate> button on the *Assignment* tab page.
- When you come to the end of a line, a new one will be added automatically by the system.
- If you have given a delegation to a person and/or a virtual entity and this delegation is about to expire, your delegates and yourself will receive a warning, 30 days before the end of the delegation:

- In Ares: the 'Preferences' link of the delegator (at the top right of the screen) and the dates of the 'Profile delegation' menu appear in **red**.

- NOTIS warnings are sent to the delegator **AND** the delegatee. Please be aware that the warnings are cumulative: ie if a second delegation is about to expire, the warning will display both ending delegations.



If the delegation has not been extended, it is automatically deleted and a warning notification is sent.

- Delegations are deleted if one of the following rule is met:
 - (1) the current organisation of the delegator has changed and is now different from the organisation he belonged to when he set the delegation
 - (2) the current organisation of the delegatee has changed and is now different from the organisation he belonged to when the delegation was set
 - (3) the delegation is obsolete (the end of the delegation is reached)
 - (4) the delegator has left
 - (5) the delegatee has left

If the contract of a user ends for a day but the new contract begins the following day, the delegation is not deleted. There are no exceptions to the first 2 rules: even if the delegator and the delegatee go both to the same service, the delegations will be suppressed. In case of reorganisation, please contact DIGIT ARES MIGRATION before the reorganisation.

See also

Delegating a task

Recovering entities

Defining virtual entities

1.5. Security

Context

The '*Security and Marking*' area allows the user to define the '*Sensitivity level*' of the document. Depending on the case in question, the user may link a marking to the document.

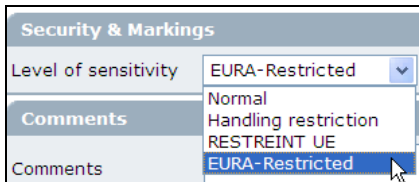
There are four levels of security in Ares:

- Normal (default option)
- Handling restriction
- RESTREINT UE
- EURA-Restricted¹⁵

The markings are defined by the Security Directorate (Security Notice 01¹⁶).

Method

- (1) When encoding the document metadata, go to the *Security and marking* field.
- (2) From the dropdown list, select the required '*Level of sensitivity*' from the three available:



Notes

- Security levels are available in French and English, except for <RESTREINT UE> which is available in French only.
- Attachments are compulsory for documents registered with a 'Normal' or 'Handling restriction' security level. However, for documents with a 'RESTREINT UE' or 'EURA-Restricted' sensitivity level, attachments are not required.
- You cannot add a marking with a <Normal> security level.

¹⁵ Please note that this classification may only be applied on documents related to nuclear safety (Euratom treaty) and is only for use by DG ENER in Luxembourg.

¹⁶ Security Notice 01: The use and application of security designators and markings:
<https://myintracomm.ec.europa.eu/corp/security/EN/Legislation/securitynotices/Pages/SecurityNotices.aspx>

See also

Visibility and Markings/ Description of markings

1.6. Visibility and Markings

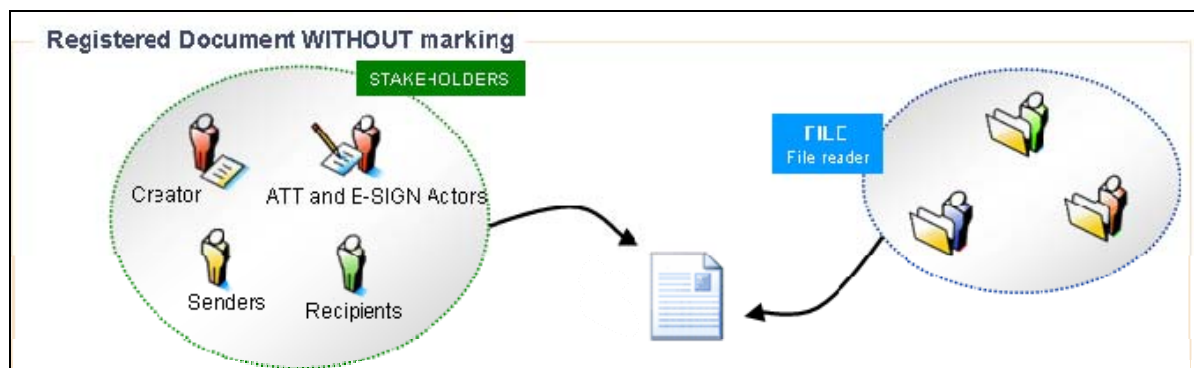
Context

Markings allow a processing instruction to be assigned to a document. A marking is not a classification, it is rather an indication of the way the marked document should be treated. This allows you to guarantee that everything processed in Ares is protected to the required degree wherever it is processed. Thus, affixing a marking may affect the document's visibility, because it will define the persons or groups who can access the document.

Not all users can affix every type of marking, some are for restricted use. For a complete description of each marking, see markings annex at the end of this manual.

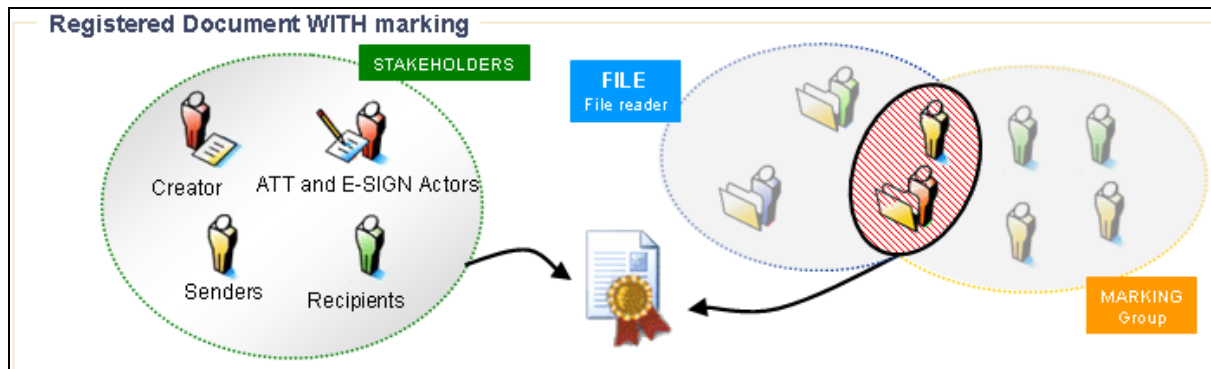
Visibility of a document without a marking:

The following drawing illustrates the visibility of a document without a marking. Stakeholders (creator, workflow actors, senders and recipients) as well as *file readers* are able to see the registered document.



- **Visibility of a document with a marking:**

If the document receives a marking, we see that the restriction introduced by the marking only concerns the *file readers*. Thus for *file readers*, the visibility of the document is restricted. (intersection of the file readers and the people having access to the marking). See below:



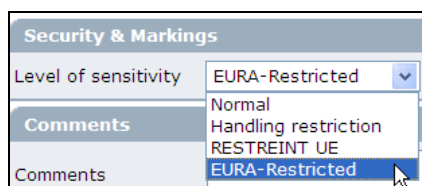
! Not all markings will technically restrict the access to the documents at filing. Indeed only markings with specified limited groups will apply the restriction in Ares (for example 'staff matter' or 'medical matter' markings). To the contrary some markings are simply a 'flag' to categorize the document (ex: 'limited', 'personal data', 'embargo') and do not modify technically the access to the document.

! The document **stakeholders** (creator, sender(s), recipient(s) and the workflow actors: assignment and e-signatory) can always see the document, whatever the marking is. Some stakeholders can add a marking, depending on the status of the document.

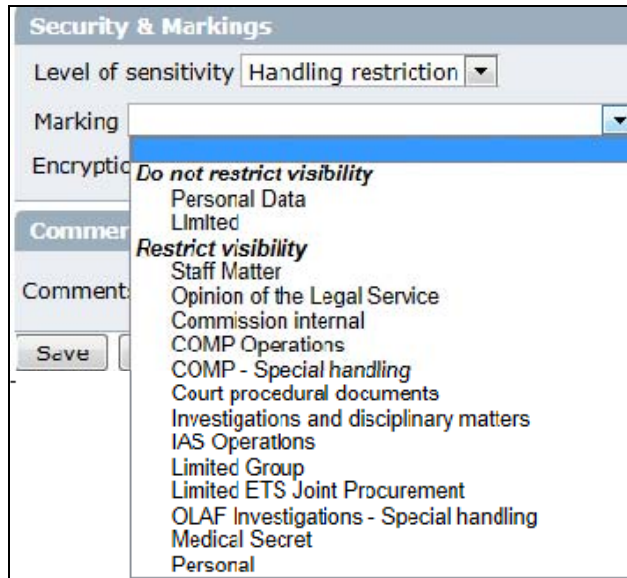
All the users are not able to use any marking; authorized rights are necessary for most markings.

Method

- (1) To insert a marking: when encoding the metadata of a document, go to the Security and marking field.



- (2) Select the level of sensitivity '*Handling restriction*' or '*RESTREINT UE*'.
- (3) Select the desired marking from the drop-down list of all markings. You can choose between several markings (depending on your rights). A descriptive tooltip is available next to each marking:



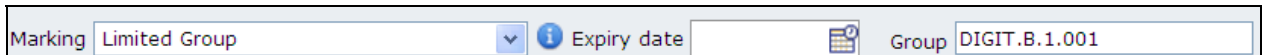
Markings are clearly separated to see the distinction between the markings that actually restrict the visibility and those that do not.

- (4) If needed, specify an '*expiry date*': at that date the marking will be removed and the document will become visible according to the standard rules. To choose a date, either type it manually or use the popup calendar (DD/MM/YYYY):

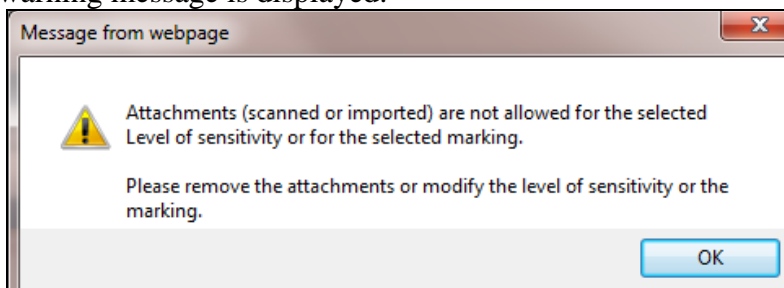





Notes

- When you choose the marking '*Limited group*' your service is put by default. You may modify it.



- Only 'Handling restriction', 'RESTREINT UE' and 'EURA-Restricted' security levels may be combined with a marking.
- 'OLAF' markings, 'COMP special handling' marking and 'Security Matter' marking should be managed as <EU Restreint>: no attachments.
Then, if you have imported/scanned a file and you choose afterwards one of these markings, a warning message is displayed:




- A document may receive only one marking at a time.
-  The markings correspond to very precise definitions and may not be used for other purposes. The standard method of managing the visibility of a document is through stakeholders and filing, rather than markings.
-  The reduced visibility of a document with a marking applies to filed documents. Before filing, a registered document is visible only to its stakeholders (i.e all those involved: document creator, senders, recipients and where applicable, workflow participants).
-  For saved documents, the only persons authorised to modify a marking are the creator of the document and the person that has the active task of the document. It is not possible to modify a registered document (unless your DG has registered the document, so your DMO has *Special modification* right).
- Be careful not to confuse 'personal ' marking with 'personal data' marking. 'Personal' marking restricts access to the document to the person concerned and the stakeholders. 'Personal data' marking has no impact on document security as all Ares users can see that marking. It does not limit access to the document but where necessary enables the user to choose a person concerned.
- **Practical example of affixing a marking:** : SANCHEZ Pedro (DIGIT B.4) registers a document with the sender VADEMO Patricia (DIGIT B.4) and the recipient LOUVET Jean-Marie (DIGIT B.4). The document (*Assignments* and *e-Signatory* tab pages) contains the assignees of DIGIT B.3 and DIGIT B.4. The document is filed in a DIGIT B.4 file and in a DIGIT file. The document is then accessible to the document stakeholders (creator, sender, recipients, workflow participants) and to all the *File Reader* users of the DIGIT B.4 file and the DIGIT B.3 file.

The creator, SANCHEZ Pedro (DIGIT B.4), with *Special Modification* rights, then affixes a **Staff Matter marking**; i.e. access is reserved exclusively for the *Staff Matter* group (HR).

Once the marking is affixed, access to the document is modified:

- access is retained for the stakeholders (creator, sender, recipients, workflow participants) who should always have access to the document
 - access is retained for only those *File Readers* of the corresponding DIGIT B.4 and DIGIT B.3 files who belong to the *Staff Matter* group (HR Digit)
 - access is withheld for all the *File Readers* of the file who do not belong to the *Staff Matter* group. For example, BORDETTI Yves (DIGIT B.3) no longer has access to the document. **Thus, user intersection, as opposed to user union, applies.**
- If an **expiry date** was set alongside the marking, the restricted visibility of the document expires on that date and the initial visibility is restored.

-  'COMP Operations', 'Court Procedural Documents', 'ETS Limited Joint procurement' and 'IAS operations' markings: users who are not stakeholders of a document marked with one of the above-mentioned markings may access the metadata, but have no longer access to the attachments when they are acting as a virtual entity or from a delegation. To have access to the attachments, they must become stakeholders, for instance by assigning themselves an INFO task. From that time onwards, they can see the attachments without changing role.

See also

Security

Visibility and Markings


1.7. Person concerned

Context

The notion 'Person concerned' points out the real recipient of the document (whom the document is about). A person concerned will always be **one of the recipients of the document** ('to' or 'cc', internal or external). Defining a person concerned allows the user to limit the access to the document with the delegation.

For example, that notion may be useful when a mail requires confidentiality (personal mail) for the recipient: an answer to a request for social or financial support, a career change, etc. The recipient would not like all his delegates to see his personal documents as they have received his delegation for work purpose. If a delegate connects to Ares on his behalf (and if that option has been set in the user's preferences), he will not be able to see the 'person concerned' documents of the person who has delegated his profile.

That option is available when you choose one of the following markings: 'Staff matter', 'Medical matter', 'Personal', 'Personal data' and 'Investigations and disciplinary matters'.

 **The only visible consequence of 'person concerned' in a document is with a delegation:** indeed the access will be only restricted to the delegates of the person who has been selected as 'person concerned' in the document. The delegates of the other recipients will be able to see the document. That parameter may be modified for each delegation, in the preferences.

Method

- (1) To select the person concerned: choose one of the following markings: 'Staff matter', 'Medical matter', 'Personal', 'Personal data' or 'Investigations and disciplinary matters'.
- (2) A drop-down list proposes all the recipients of the document ('to' or 'cc', internal or external). Select the concerned person from the list. (If you do not want to choose a

recipient, select the default white line).

Security & Markings	
Level of sensitivity	RESTREINT UE
Marking	Medical Secret
Expiry date	
Person concerned	DELHAUWE Gregory RAEYMAEKERS Ralph
Comments	

- (3) After saving or registering the document, the person concerned will be visible in the 'identification' of the document:

Document					
Filing	Assignment	e-Signatory	Link		
Identification					
Registration number : Ares(2013)932		Save number : digit.b.1.001(2013)1833		Registration date : 15/10/2013	
Title : vérification procédures					
Type	Ares	External ref.	Size	Version	
No file imported					
I/E	Sent by	Service/On	I/E	TO/CC	Received by
I	BOTTON Isabelle	(PMO.7.001)	I	TO	DELHAUWE Gregory
			I	CC	RAEYMAEKERS Ralph
					(DIGIT.B.1.001)
					(DIGIT.B.1.001)
Mail type : Internal Creation date : 15/10/2013 Creator : KACI Emilie Register author : KACI Emilie Level of sensitivity : RESTREINT UE Document encrypted : No Encryption Expiration Date : Comments : Signed by :			Document date : 15/10/2013 Sent date : Marking : Medical Secret Marking Expiration Date : Person concerned : DELHAUWE Gregory		

2. MODULE 2: CREATING A DOCUMENT FROM THE DOCUMENT MENU

2.1. Definition of fields

Context

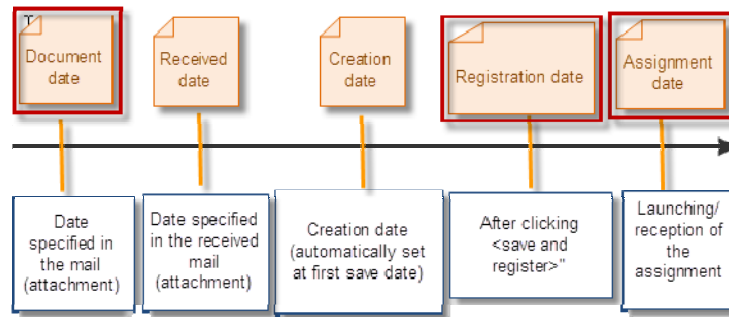
Definition or meaning of the main fields completed when entering a document.

Description

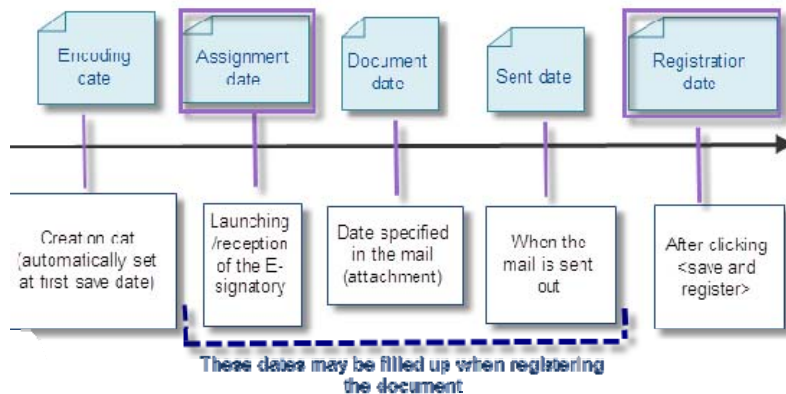
- *Internal mail*: mail sent or received within the Commission, i.e. the senders and the recipients are within the Commission.
- *Incoming mail*: mail from an external sender received by the Commission
- *Outgoing mail*: mail sent to at least one recipient outside the Commission
- *Document date*: date specified in the mail (attachment)
- *Date received*: date specified in the received mail (attachment)
- *Sent date*: when the mail is sent out
- *Date of encoding*: date on which the document was encoded (generated by the system)
- *Title*: succinctly describes the content of the document to give an overview of what it is about without it having to be read in detail.
- *Distribution lists*: a distribution list is a pre-defined list of people that you can enter in the recipient line. This allows you to save a considerable amount of time by inserting an entire group of recurring recipients in a single entry.
- *Security Level*: this functionality allows you to encode and process classified documents (with a sensitivity level other than 'normal') in Ares. This allows you to guarantee that everything handled in Ares is protected to the required degree everywhere it is handled.
- *Marking*: allows a processing instruction to be assigned to a document. A marking is not a classification, rather an indication of how the marked document should be treated.

Many dates are used in Ares documents; it is sometimes difficult to use the proper date when searching. The following are key dates: document date, assignment date and registration date.

- Timeline for an incoming document:



- Timeline for an outgoing document:



2.2. Creating a new document, entering data and saving

Context

How to create a document in Ares, complete the different fields of the document, attach an attachment to the document.

Method

- (1) Click on **Add** in the **Documents** navigation menu
- (2) This gives you the entry screen allowing you to create a new document:
- (3) Select the type of mail from the dropdown list: *Incoming mail*, *Outgoing mail* or *Internal mail*.
- (4) Click on <Import> to add the attachment to the mail

Import an attachment from your PC

Type:

Attachment: *

Attachment Name: *

External reference:

Language :

Support:

- (a) Choose from the drop-down list the attachment type: main document, cover note or annex.
- (b) Click on <Browse...> to select an attachment
- (c) The *Attachment name* and its format are automatically detected and entered. The *Attachment name* may nevertheless be modified if necessary.



You cannot enter special characters ('/', '*', '?', etc.) in the *Attachment name*. Ares automatically detects these as they are entered (the text becomes red) and it is impossible to add the attachment:

Import an attachment from your PC

Attachment:


Attachment Name: .vsd

Ex

La

SU


Microsoft Internet Explorer

 The name of the attachment may not contain the following characters : \/:*?"<>|

- (d) Complete the *External reference*: The reference given in a mail received from outside the Commission.
- (e) Select the *Language* of the text. (The default value for the field is *NS-Unspecified*)
- (f) Specify the type of *support*:
 - *Native electronic*: Any document created directly on a computer (e.g. a Word document), except e-mails.

- *Scanned*: Any document that the user digitised independently of Ares. (Note: A document digitised with Ares will then be called: *Ares Scanned*)
- *E-mail*: Any e-mail

(g) Click on <Add>

- (5) Enter the *Document date* by typing it manually (DD/MM/YYYY) or by clicking on the  icon for an interactive pop-up calendar. (Mandatory field)


The current date is automatically entered under *Date received* (for an incoming mail) or *Date sent* (for an outgoing or internal mail) but may be modified. (Optional field)

The *Date of encoding* is entered automatically on the date of creation. (Optional field)

- (6) Enter data in the *Title* field.


- (7) Enter the *Sender*

(a) Select from the *int* or *ext* list depending on whether the sender is inside or outside the Commission.

(b) Perform a search  or manually enter the first letters of the name to see a list of names that potentially correspond to your entry. From this list, select the name you want and the *Organisation/Service* field will be completed automatically.

- (8) Enter the *Recipients*

(a) Select from the *int* or *ext* list depending on whether the recipient is inside or outside the Commission.

(b) Select a *Distribution list* or perform a search  or manually enter the first letters of the name and the search full text will show a list of names that potentially correspond to your entry. From this list, select the name you want and the *Organisation/Service* field will be completed automatically.

- (9) If necessary specify the sensitivity level and the marking.

- (10) Enter any comments you may have

- (11) Confirm your data by clicking on <Save>

- (12) The document metadata is summarised in the *Identification* area:

Document Filing Assignment e-Signatory Link

Identification

Save number : digit.b.1.001(2012)183
 Title : Politique d'expansion

No file imported

Type	Actions	Native	Lang.	External ref.	Version
No file imported					

Doc Actions

- Copy
- Answer
- Modify
- Print
- Send link
- Add translation
- Manage procedure


I/E	Sent by	Service/Organisation	I/E	TO/CC	Received by	Service/Organisation
1	DEL BARRIO Luis	(ESTAT.B.1)	I	TO	DIEU Frederic	(DEL-PHILIPPINES.005)

Mail type : Internal
Creation date : 18/01/2012
Creator : KACI Emilie
Register author :
Level of sensitivity : Normal
Document encrypted : No
Encryption Expiration Date :
Comments :
Signed by :

Document date :
Sent date :
Marking :
Marking Expiration Date :
Person concerned :

The document receives a save number with the name of your department (DG), year of creation and an incremented number. Please notice that, when saving your document, recipients in 'to' and recipients in 'cc' are gathered automatically

Notes

- 'Recipient(s)' field:  button deletes several recipients at the same time in a document:

Recipient(s)

Distribution list


<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	to/cc	I / E	Name - First Name	Organisation / Service	<input type="button" value="Up"/>	<input type="button" value="Down"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	to	int	GRISPIGNI Marco	SG.B.2	<input type="button" value="Up"/>	<input type="button" value="Down"/>
<input type="checkbox"/>	<input type="checkbox"/>	cc	int	PICHON Eric	SG.B.2	<input type="button" value="Up"/>	<input type="button" value="Down"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	cc	int	SCOTTINI-TRUSSART Monique	SG.B.2	<input type="button" value="Up"/>	<input type="button" value="Down"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	cc	int	HANDLEY Peter	SG.B.2	<input type="button" value="Up"/>	<input type="button" value="Down"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	cc	int	ANDRYKIEWICZ ZMYSLONA Ewa	DIGIT.B.1.001	<input type="button" value="Up"/>	<input type="button" value="Down"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	cc	int			<input type="button" value="Up"/>	<input type="button" value="Down"/>

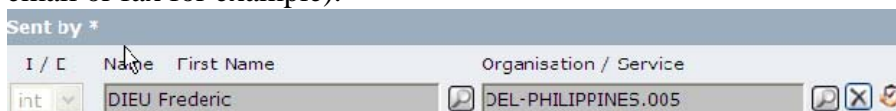
- You also have the possibility to modify the order of 'to' and 'cc' recipients: put your mouse on the 'up/down' column, click the arrow appearing and move it up or down, as you do for e-signatories. (Note that 'To' and 'cc' are always gathered together though)


Recipient(s) *

Distribution list

<input type="checkbox"/>	<input checked="" type="checkbox"/>	to/cc	I / E	Name - First Name	Organisation / Service	Up/Down
<input type="checkbox"/>	<input checked="" type="checkbox"/>	to	int	WALLON Arnaud	DIGIT.B.4.001	<input type="button" value="Up"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	to	int	VILRET Xavier	DIGIT.B.4.002	<input type="button" value="Up"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	to	int	VERILE Marco	JRC.G.2	<input type="button" value="Up"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	to	int	VERHAEGEN Bernard	DIGIT.B.4.002	<input type="button" value="Up"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	to	int	VASILE Iuliana	DIGIT.B.4.003	<input type="button" value="Up"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	to	int	VAN WYNSBERGHE Yvan	DIGIT.B.4.002	<input type="button" value="Up"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	to	int	VAN DEYCK Jurgen	DIGIT.B.4.003	<input type="button" value="Up"/>

- If a recipient does not have to Ares in his DG ('manual' user), the icon  appears next to his name when encoding the document. You then have to send him the mail out of Ares (by paper, email or fax for example).

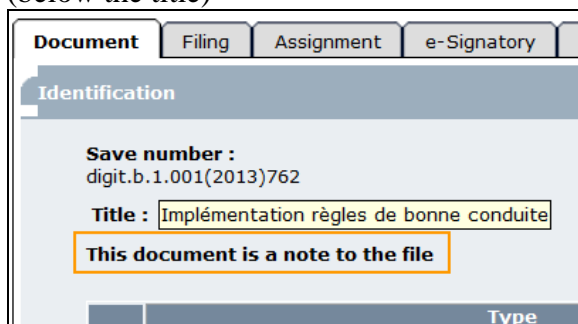


-  Documents generated in Ares do not contain the label 'I' (In) or 'O' (Out); the *Mail type* is noted in the *Identification* area (internal, incoming or outgoing).
- *Note to the file (note au dossier)*: can no longer be selected as sender or recipient in a document. Now, when creating your document, please tick <This document is a note to the file> when necessary:




If you tick this box you cannot address your document directly to recipients any more (i.e. 'to') but still insert 'Cc' recipients.

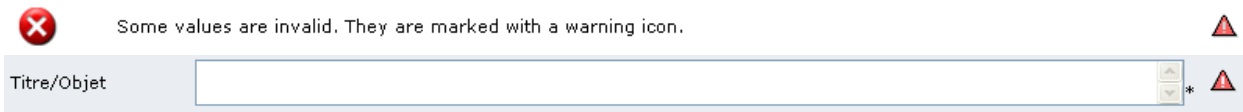
The information that a document is a *Note to the file* is then displayed in the document details (below the title)




Note: existing documents where *Note to the file* was selected as recipient will be updated with the new display.

- The system automatically offers you encoding help when you are selecting the mail type: The *Senders* and *Recipients* fields are set as *External* or *Internal* as appropriate. However, you may still modify the radiobuttons and metadata when you are entering your data:
 - Internal mail: the senders and the recipients are set as *Internal*
 - Incoming mail: the senders are set as *External* and the recipients as *Internal*
 - Outgoing mail: the senders are set as *Internal* and the recipients as *External*
- The  icon next to certain fields allows you to delete the value in those fields.
- <Reset> allows you to delete all the fields of the document, including the attachment(s).

- The mandatory fields when saving are indicated by an asterisk. If one of these fields does not contain the required data, an error message appears when you try to save:

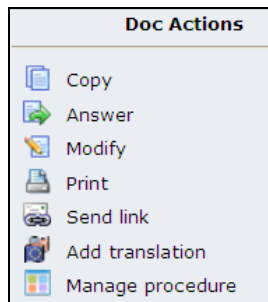


- The document does not have to have an attachment or be filed if it is saved (and not registered)

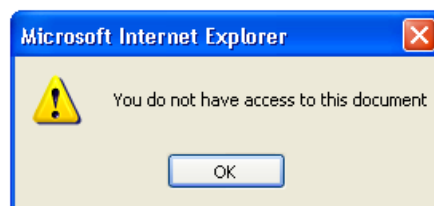
-  If the document is saved (without launching the workflow), it can only be accessed or changed by its **creator**. If the document enters a workflow (assignment or e-Signatory), the document then becomes accessible to the workflow participants (assignees) and, where appropriate, to the senders and recipients.

As soon as a document is filed in a file, whether this document is registered or saved, access to the document is extended to all the persons who have the *File Reader* right for this file. **It is the filing functionality that determines extended visibility for the document.**


- Different pushbuttons at the top right of the screen ('Doc actions' menu) allow you to :

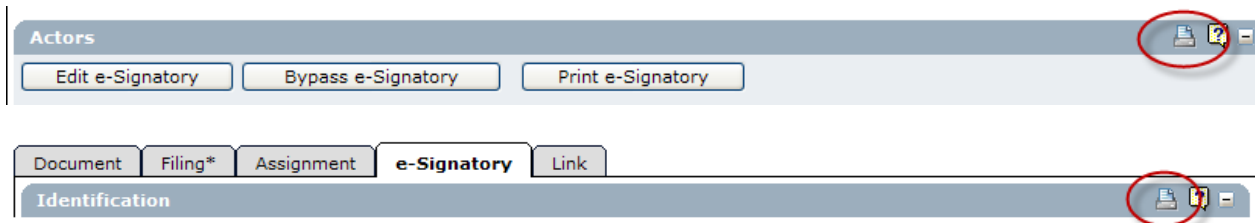


- (a) **Copy** Metadata to create a new Document
- (b) **Answer** to the Document
- (c) **Modify** the current Document
- (d) **Print** (print the Detail sheet, the Circulation Sheet or even the Divider Sheet)
- (e) **To send the link** via Ms Outlook towards the Document. If the receiver of your message doesn't have enough rights to see the document content's the following error message is displayed:



- (f) **Add a translation**
 - (g) **Associate a procedure** to the document (Courrier du Président or documents with the Cabinets).
- If you have the requisite rights, you may also have <Copy to the external>button. It enables you to externalize a document outside of the Commission. For more information, see chapter 23 in this manual.

- You can directly print the detail sheet, the divider or the circulation sheet with the icon , available in the corresponding tab:



See also

Adding an attachment to the document: Importing or Scanning

Recovering entities

Creating and using distribution lists

Automatic assignments

Access rights and security

Modifying a saved document

2.3. Modifying a saved document

2.3.1. Modifying the metadata of a saved document

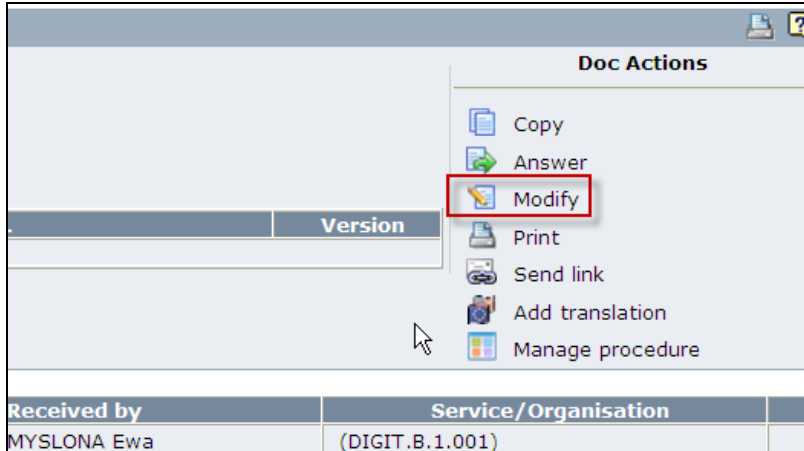
Context

The metadata that compose a saved document may be modified (if you have the required rights).

Method






- (1) Find the document that you want to modify.
- (2) Access the document details by clicking on the hyperlink in its title.

- (3) Click <Modify> pushbutton (at the top right corner). :



- (4) Modify the desired fields
- (5) Click on <Save> to save the document or on <Register and Send> if you want to register it. Click on <Cancel> to exit the document without saving the changes.

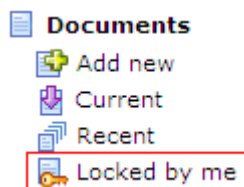
Notes

-  As soon as you click on <Modify>, the screen will become automatically in 'modal' mode: that is to say you will not be able to click on any buttons of the navigation menu for instance. To leave the screen you need to click on <Cancel>, <Save> or <Register and send>. This modal mode prevents many unwanted documents locks.
-  Only the creator of a document can modify it. If the document has entered a workflow (assignment or e-signatory), the document becomes then accessible to the workflow participants (assignees) and, where appropriate, to the senders and recipients.
- When a saved document is being modified, the save number appears on the *Document* tab page.
- The  icon next to certain fields allows you to delete the value in those fields.
- The  icon next to the attachment allows you to manage different versions of an attachment that may exist.
- <Reset> allows you to delete all the fields of the document, including the attachment(s).
-  A concurrent access system is established for saved documents: If a user is already in the middle of modifying a document, it will then be 'locked' (reserved) while this user modifies it. If another user clicks on the <Modify> button at the same time, they will receive the message below informing them that the document is being modified and is currently unavailable.





⚠ Remember to click on <Save>, <Register and send> or <Cancel> again to finalise your modifications, thus unlocking the document for future use. Moreover, a locked document can disrupt the scheduling of tasks.

It is possible to display the list of the document locked by yourself via the menu 'Documents/' 'Locked by me'.



- The system will then show you the list of locked document or locked attachments. Select the document to unlock.

Documents locked by me				
<input type="checkbox"/>	Locked element(s)		Title/Subject	
<input type="checkbox"/>			Présentation du budget ich weiß	digit.b
<input type="checkbox"/>			diese dans titre	digit.b
<input type="button" value="Unlock"/>				

- The  icon means that a document has been locked. The  icon means that an attachment has been locked.
- Press the <Unlock> button

See also

Defining fields

Adding an attachment to a document

Registering a document

Practical example: replying to a document

Access rights and security

2.3.2. *Modifying an attachment to a saved document: check-out/check in*


Context

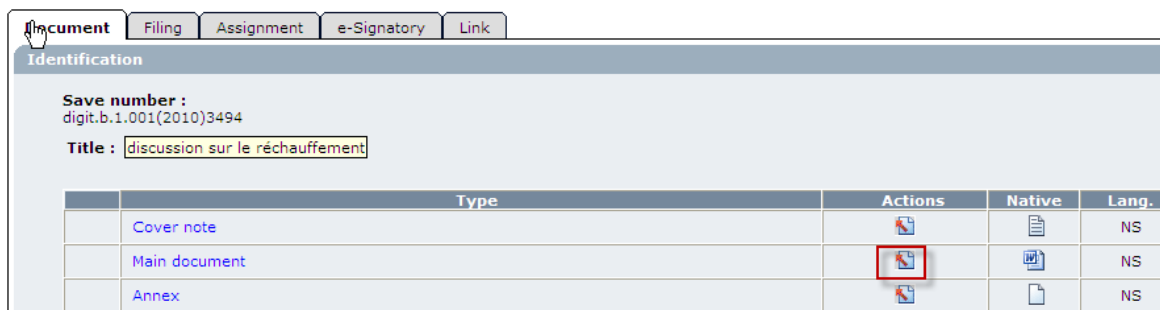
An attachment to a saved document may be modified (if you have the required rights) by creating a new version of this attachment. It will be possible to view all the versions (modifications) of a given attachment.










Modifying an attachment should be done through 'check out-check in'. Indeed, if you simply click on the name of the attachment, you will not be able to do the attachment versioning.

Method

- (1) Find the document you want to modify.
- (2) Access the document details by clicking on the hyperlink in its title.
- (3) Click on the  icon to check out (book) the document to prevent other users from modifying it at the same time.



Type	Actions	Native	Lang.
Cover note			NS
Main document			NS
Annex			NS

- (4) The attachment opens in the corresponding editor (MS Word, MS Excel, etc.). Please make the necessary changes.
- (5) Save the file.
- (6) Close the application (for example Ms Word).
- (7) To make the attachment available to other users, click on the check-in icon in the *Actions* column: 

Document | Filing | Assignment | e-Signatory | Link

Info: You can't modify the document and its security because an attachment is locked. The attachment must be unlocked before you can continue.

Identification

Save number :
digit.b.1.001(2010)3494

Title : discussion sur le réchauffement

	Type	Actions	Native	Lang.
	Cover note			NS
	Main document			NS
	Annex			NS

- (8) On the check-in screen, you must then specify the nature of the modifications that you have made:

Checkin : Answer.doc

Answer.doc *

Version : 1.0, CURRENT
Type: hs_document
Format: msw

Save as : ☐ 1.0 (same version) ☒ 1.1 (minor version) ☐ 2.0 (major version)

Version label:

Description:

Format: MS Word 4.x, 5.x (DOS)

► Show options

- (a) You can change the name of the attachment. A name must be given for the attachment).

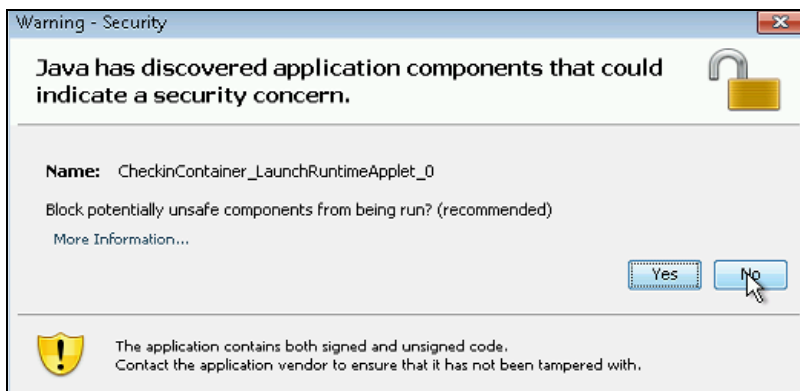
- (b) Specify the version under which you want to save the attachment: <1.0> *Same Version* (version identical to the original, use only if you have not made any changes), <1.1> *Minor Version* (minor changes) or <2.0> *Major Version* (major changes with an incremental change of the version number).
- (c) You can add a label to the version in the *Version Label* field and a *description* of your changes
- (d) *Format* allows you to specify the format of the attachment.

A click on 'Show options' displays additional possibilities:

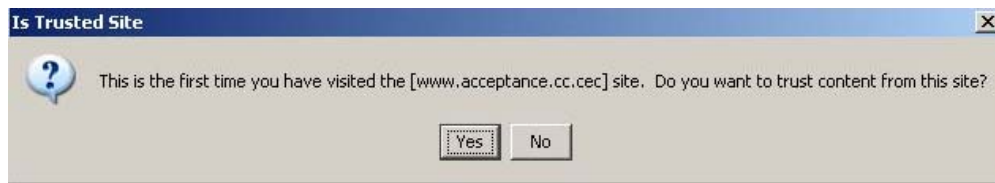
- (a) Tick the *Retain Lock* checkbox if you do not want the attachment to be unlocked following your changes. By default, this option is not ticked.
 - (b) The *Make the current version* field, which is ticked by default, displays the last version that you have just uploaded on the *Document* tab page.
 - (c) <Keep a local copy after check in> allows you to keep a copy of the modified file into your PC. For future reference, the file is then saved in C:\Documents and settings\userlogin\Documentum\Checkout.
 - (d) Click on <OK> to confirm or <Cancel> to cancel the check-in.
- (9) Check-in is completed and your changes saved. The lock is removed and the document and attachment may be used by other users again.


Notes

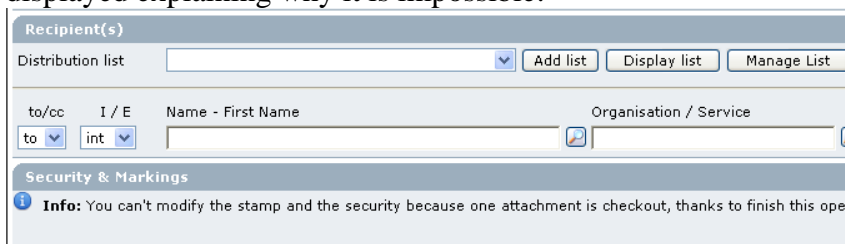
- The very first time you launch a check-out, the following messages are displayed. You must click <No> to continue (if the file is safe):






Then click <Yes>:




- It is not possible to do a check-in/check-on translations.
-  When an attachment is checked out, it is impossible to perform security modifications on the document: you cannot add assignments, you cannot add or modify the e-signatory, you cannot file, you cannot modify the properties of the check-out, you cannot close a task, you cannot modify the document and you cannot register the document. For example, if a user wants to close his task on a document where there is a check-out, a warning message will be displayed explaining why it is impossible:




- It is only possible to modify an attachment and use the check-in/check-out system for saved documents.
- Only the document creator has the option 'Same version'
- When you modify an attachment, the  icon appears beside the name of the attachment. The attachment is now locked and cannot be used by any other user while you are modifying it. The other users see the lock icon .
- Clicking on the  icon cancels the check out. A message warns you that your changes will not be saved; the original attachment remains intact in Ares. Click on <OK> to confirm the cancellation or on <Cancel> to cancel. If you tick the <Do not show this warning again> checkbox, this warning is not displayed in future when you click on <Cancel check out>.



- The  icon allows you to display the different versions of a given attachment: this icon also opens a window listing the details of these versions and a link to each of them:

File versions:						
Version	No	Version Label	Description	Last change date	Last modified by	Size
Current	1.1	text review	new paragraph added	19/03/2012	tanghga	124416 kBytes
Older	1.0					124416 kBytes

-  After the registration of the document only the creator of the document and the e-signatory participants will see the previous versions of the attachments.

See also

Adding an attachment to the document: importing or scanning

Registering a document


2.4. Deleting a saved document

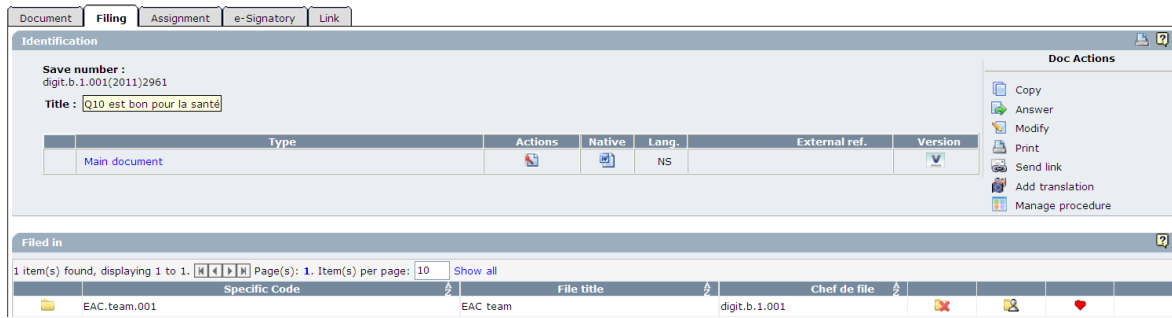
Context

A saved document can be deleted by removing it from all the files it is in. This allows it to be recovered in case an error occurs. All unfiled saved documents will be automatically deleted 6 months after their creation.

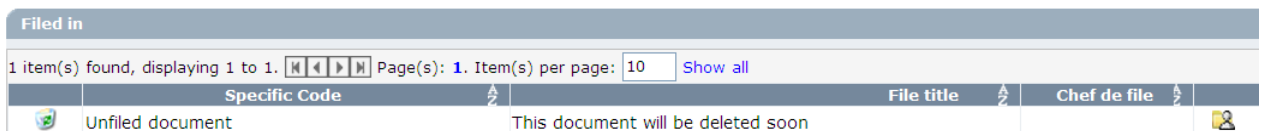
To recover a document unfiled, simply file it again in a file.

Method

- (1) Find the document that you want to delete.
- (2) Access the document details by clicking on the hyperlink in its title.
- (3) The tabs of the document are displayed. Click on the 'Filing' tab.
- (4) Click on the  icon before removing the document from the file in which it was filed:



- (5) The document was filed in only one file. It is then registered for deletion (unfiled):



Note

A registered document can not be deleted. Exception: if the file where the document is filed into is deleted (for example, after a HPS first review, if the category linked to the file implies a deletion, the file and its documents must be eliminated. For more details about preservation/HPS/NomCom, please consult NomCom user manual).

2.5. Adding an attachment to a document

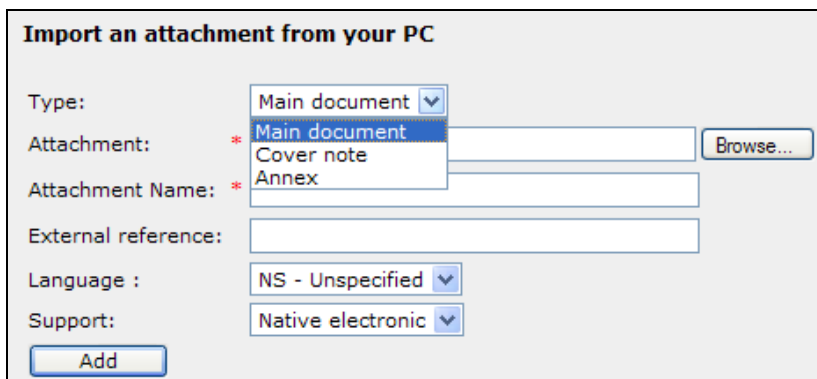
Context

An attachment may be added to a document by importing or scanning. After importing or scanning an attachment, click on its type to open it.

Method

2.5.1. Importing


- (1) Click on <Import> to add the attachment. The following screen appears:

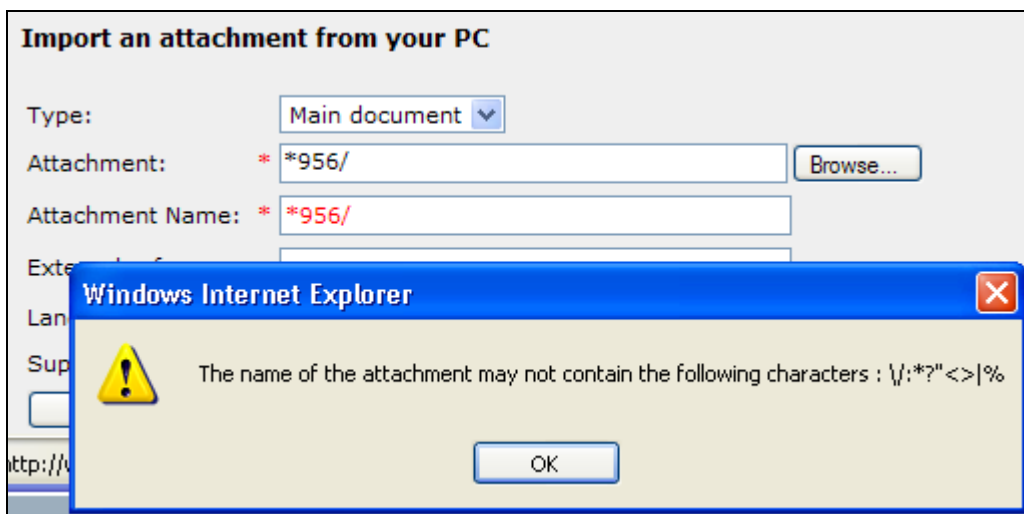


The dialog box is titled "Import an attachment from your PC". It contains several fields and buttons:

- Type:** A dropdown menu with "Main document" selected.
- Attachment:** A text field containing "Main document", a red asterisk icon, and a "Browse..." button.
- Attachment Name:** A text field containing "Cover note", a red asterisk icon, and a dropdown menu with "Annex" selected.
- External reference:** An empty text field.
- Language :** A dropdown menu with "NS - Unspecified" selected.
- Support:** A dropdown menu with "Native electronic" selected.
- Add:** A button at the bottom left.

- (2) Select the *type* of attachment: 'main document', 'cover note' or 'annex'
- (3) Indicate the path of the attachment or click on <Browse> to select the attachment to import.
- (4) The '*Attachment name*' and its format are automatically detected and entered. The '*Attachment name*' may nevertheless be modified if necessary.

 You cannot enter special characters ('/', '*', '?', etc.) in the '*Attachment name*'. Ares automatically detects these as they are entered (the text becomes red) and it is impossible to add the attachment:



The dialog box is titled "Import an attachment from your PC". It contains several fields and buttons:




- Type:** A dropdown menu with "Main document" selected.
- Attachment:** A text field containing "*956/", a red asterisk icon, and a "Browse..." button.
- Attachment Name:** A text field containing "*956/", a red asterisk icon, and a dropdown menu with "Annex" selected.
- External reference:** An empty text field.
- Language :** A dropdown menu with "NS - Unspecified" selected.
- Support:** A dropdown menu with "Native electronic" selected.
- Add:** A button at the bottom left.

Overlaid on the dialog box is a "Windows Internet Explorer" error message box. It contains a yellow warning icon and the text: "The name of the attachment may not contain the following characters : \/:*?\">|%. There is an "OK" button at the bottom.

- (5) Enter the '*External reference*' if necessary, e.g. the reference given in a mail received from outside the Commission.
- (6) Select the '*Language*' of the text. (The default value for the field is 'NS-Unspecified')
- (7) Specify the type of '*Support*':

- '*Native electronic*': any document created directly on a computer (e.g. a Word document), except e-mails.
- '*Scanned*': any document that the user scanned independently of Ares. (Note: A document digitised with Ares will then be called: *Ares Scanned*)
- '*E-mail*': any e-mail

(8) Click on <Add>:

	Type	Actions	Natif	Lang.	External ref.	Version
	Main document			NS		

2.5.2. Scanning with Ares

(1) Click on <Scan> to add the attachment. The following screen appears:

Scan a document

Type: Main document ▼


Attachment name:

External reference:

Language: NS - Unspecified ▼

Support : Ares scanned

Add

- Select the type of document: main document, cover page or annex.
 - Enter the '*Attachment name*'.
 You cannot enter special characters ('/', '*', '?', etc.) in the *Attachment name*. Ares automatically detects these as they are entered (the text becomes red) and it is impossible to add the attachment.
 - Enter the '*External reference*' if necessary (reference number of the mail given by the sender outside the Commission)
 - Select the '*Language*' of the attachment.
 - The support will be automatically detected and displayed as '*Ares scanned*'.
 - Click on <Add>
- (2) Save the document.

- (3) In the *Identification* area of the document, click on the barcode corresponding to the attachment.

Type	Actions	Native	Lang.	External ref.	Version
Main document			EN		

- (4) To print the divider, enter first the divider information:

Print divider

Attachment name:

Two-sided scanned document: ☐

Total number of sides:

Modification authorised: ☐ (Until 30/06/2008 16:04)

Divider valid until: ☐ (Until 01/07/2008 15:04)

- (a) The '*Attachment name*' is entered automatically.
- (b) Tick the following checkbox to scan the document on both sides. The back side of the divider will not be scanned. (If the box has not been chosen for a two-sided document, the first scanned page will be empty).
- (c) Indicate the total number of pages.
- (d) Tick the following checkbox if you authorise the modification of the document.
- (e) Tick the last checkbox if you want to set an expiry date for using the divider¹⁷.
- (f) Click on <Print> to start printing the divider.
- (5) Continue the procedure on the correct copier
- (a) Put the divider which you have just printed in the appropriate copier, followed by the document(s) to be scanned.
- (b) Select the button for scanning (Ares).

¹⁷ This option has not been activated yet in the current version of the application.

- (c) The document is automatically scanned and sent to Ares as an attachment.

2.5.3. Attachments display

- (1) The link to the attachment is set on the attachment type: for example you have to click on 'main document' to open the attachment. The title of the attachment is visible in a tooltip on the type:

Document | Filing™ | Assignment | e-Signatory | Link

Identification

Registration number : Ares(2012)100 Save number : digit.b.1.001(2012)182 Registration date : 18/01/2012

Title : Politique d'expansion

Type	Ares	Native	Lang.	External ref.	Size	Pages	Version
Main document			ET		0,08 MB	2	

expansionisme.doc

- (2) For each attachment, specific columns are displayed. The columns will differ if the document is saved or registered.

SAVED DOCUMENTS

Tra	Type	Actions	Natif	Lang.	External ref.	Version
+	Main document			NS	2009/op	
	Annex <u>douane.doc</u>			FI		

Click on the type to open the native attachment. A tooltip shows the full name of the attachment.

icon appears if the attachment is locked.

If applicable, translations are available from the +.

Language: ISO code and tooltip with complete name of the language

Original version of attachments:

- imported (PDF, DOC, JPG, etc.).
- scanned: type (PFD or TIFF) and scan status : available, pending, failed conversion.

Available actions on attachments: check-out/ check-in/ cancel check-out. (not for translations nor scans).

Consulation of previous versions of attachments (except scans and translations). Visible by everyone.

REGISTERED DOCUMENTS

Tra	Type	Ares	Natif	Lang.	External ref.	Size	Pages	Version
	Main document			FR		0.01 MB	0	
	Annex nouvelles règles de calcul.xls			ES	128/9020	0.02 MB	0	

Click on the type to open the Ares attachment (pdf with stamp). A tooltip shows the full name of the attachment.

If applicable, translations are available from the +.

Language: ISO code and tooltip with complete name of the language.

Size and number of pages of native attachments.

Consultation of previous versions of attachments (only visible to the creator and the e-signatory participants) Not for scans and translations.

Original version of attachments: imported (, , , , ...) or scanned (,) .






Status of the converted Ares files: conversion available, pending, failed conversion.

Notes

- ⚠ **You must check that the file has been scanned before registration.** Indeed you have to scan the attachment in the saved document before registration. If you do not scan, the system will not allow you to continue with registration.

Type	Lang.	External ref.	Support	Actions
Main document	Unspecified		Ares scanned	
				You must scan the attachment before registering the document





- Moreover, **it will not be possible to scan after registration**: neither the printing of the divider nor the scanning will be allowed.
- Type of document: the default type is 'main document'. You may use several times the same type of attachment in the same document. Next to each attachment will be shown: the language of the original document, a little '+' to let users see translations (if available).
- The attachments are displayed in the following order: 'cover page', 'main document' then 'annex'. You may choose not to order them automatically (i.e. not to follow this order) and sort them manually: after importing/scanning your attachments, tick <Do not automatically sort attachments>:


Support	Actions	Up/Down
ec.	 	
ec.	 	
<input type="checkbox"/> Do not automatically sort attachments		

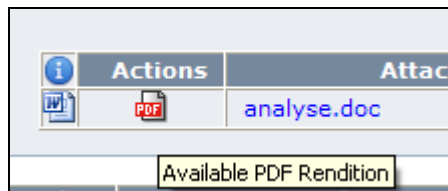
You can move the blue arrow up and down to sort them.



If you have already saved your document and you have chosen to modify the order of attachments, it will not be possible to return to the automatic sort:

	Support	Actions	Up/Down
	Native elec.	 	
	Native elec.	 	
The manual sort is applicable. Default sort does not apply anymore			

- The link to open an attachment is set on the attachment type. The title of the attachment can only be seen in a tooltip on the file type.
- You can scan out of Ares and then import it into an Ares document.
-  After each registration, Ares automatically converts each attachment in pdf. Thus two different file formats will be available: the original format (ex: Word, Rtf...) and the rendered pdf format. Only the pdf version will be stamped.



- The attachments are compulsory for registered documents with a '*Normal*' or '*Handling restriction*' security level. However, documents with an '*RESTREINT UE*' sensitivity level must not have attachments.

See also

Registering the document

Scanning

2.6. Recovering entities

Context

'Entity' refers to any data on a person or organisation. Entities may be internal, external or virtual.



- **Internal entity:** any person, as well as the internal body to which that person belongs, belonging to the Commission (Directorates-General/Departments, executive agencies, representations, delegations, etc.). Internal entities are traverse in the whole Commission. You must not create internal persons as the entire database is automatically imported and regularly updated in Ares.
- **Virtual entities** are fictional entities that gather together users and/or groups under an identical name. Virtual entities are the equivalent of the Outlook functional mailboxes (e.g. SG-Domec) and Commission departments (e.g. DIGIT.B.4). These entities are considered as internal entities and must be created manually in the application.
- **External entities:** organisations or persons not belonging to the Commission. Data concerning external entities can be used by all DGs. Its encoding (both for persons and bodies) is limited to the user with the appropriate role and must comply with the e-Domec rules. The system checks for the possible existence of the entity in the database. The new data is checked (internal validation at DG level and validation at central Commission level). Once checked, this new data can be fed into the common database.





In the '*Senders*' and '*Recipients*' fields, these entities represent the persons and their organisations that can be entered, either by auto-complete or by means of a more detailed search.


Method

First select *Int* or *Ext* depending on whether you are searching for an internal or external entity.



2.6.1. Auto-complete

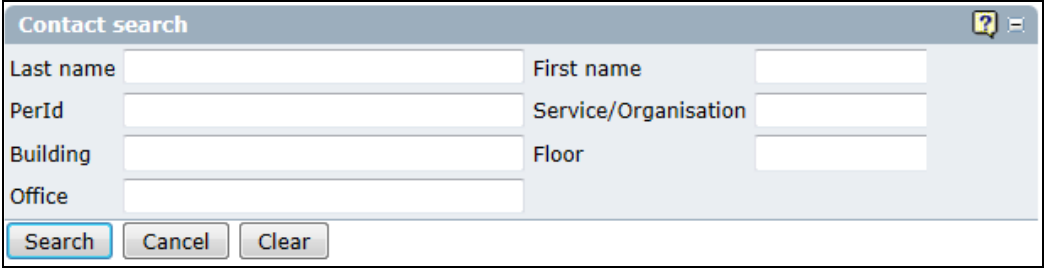
- (1) Enter the first three letters of the name of the person you are looking for in the *Last Name* – *First Name* field.
Enter no more or no less, to ensure that your search produces usable results.
- (2) After a few seconds the dropdown list displays – in alphabetical order – the first ten names that potentially match your search.
- (3) Select the desired person by mouse-click or by using the arrows on your keyboard followed by the *Tab* or *Enter* key.
- (4) The person's organisation is automatically displayed.
- (5) If the entity is encoded properly, a green arrow  appears for a few seconds and the field is greyed out.
 Ensure that this area is greyed out, indicating that the selected person has been entered. If it remains white, the required data has not been entered correctly.

I / E	Name - First Name	Organisation / Service
int	LESTIDEAU Caroline	DIGIT.B.1.001
		  

If the name you are looking for is not listed in the first names suggested, enter the following letters of the name to refine the list of results or launch a search .

2.6.2. Search



- (1) Type the first letters of the name of the person you are looking for in the *Last Name – First Name* field and click on  or click directly on .
- (2) A *Search contact* window opens.




The 'Contact search' window is a light blue dialog box with a title bar containing a question mark icon and a close button. It contains two columns of text input fields. The left column has fields for 'Last name', 'PerId', 'Building', and 'Office'. The right column has fields for 'First name', 'Service/Organisation', and 'Floor'. At the bottom, there are three buttons: 'Search' (highlighted in blue), 'Cancel', and 'Clear'.

- (3) Enter the required criteria and click on *<Search>*. (If you have encoded the first letters of the entity you are looking for, these are already included in the search criteria and are taken into account in the result).
 - (a) If you are not satisfied with the results, you can add or modify the search criteria. *<Delete>* allows you to clear all the fields. To search again, click on *<Search>*.
 - (b) To exit the *Search contact* window without selecting anything, click on the *<Cancel>*.
- (4) To confirm a selection, click on the entity selected: the *Contact Search* window closes automatically. The entity is inserted in the metadata of your document.

Notes

-  If the contact has not been encoded correctly, the  icon will appear. It will also appear if you select a name that is already included in the list of Senders or Recipients to inform you that this contact already exists. Or for example if the chosen name is no longer valid (ex: the user is working in another service, has left the Commission...)

In this case, delete the line  and start again.

- You can select only an organisation.

See also

Common repository

Virtual entities

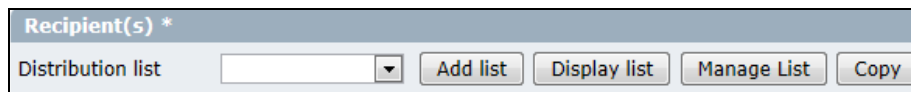
2.7. Creating and using distribution lists

Context

A distribution list is a pre-defined list of people that you can enter in the '*recipient*' line. This allows you to save a considerable amount of time by inserting an entire group of recurring recipients in certain types of document.

'Distribution list' refers to a list composed of several entities, internal or external, and/or functional mailboxes. It can be personal or shared at unit, department, DG, 'Commission', 'EEAS', 'Executive Agencies (EA)' and 'All' level (list visible to hermes_group i.e. Commission, EEAS and EA) (depending on your rights).

Method



2.7.1. Inserting a list

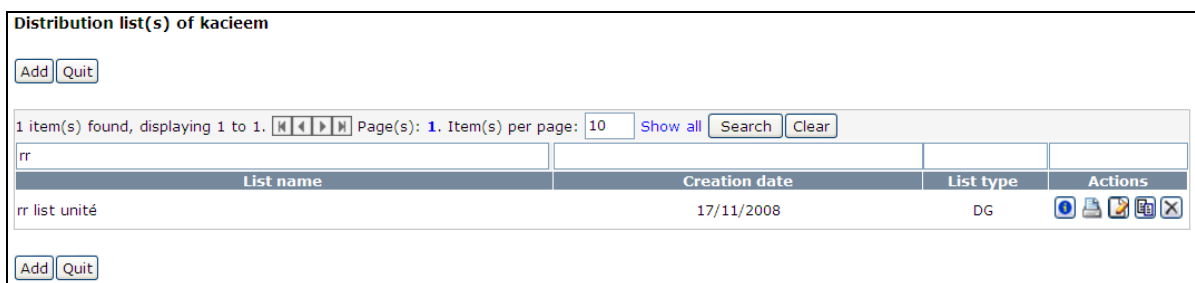
- (1) Select the desired list from the dropdown list under '*Distribution list*' menu.
- (2) Click on <Add List> to insert the distribution list in the '*recipient*' field.
- (3) The list of persons covered by the list appears in your document.





2.7.2. Consulting a list

- (1) Select the desired list from the dropdown list.
- (2) Click on <Display list>

2.7.3. Creating or modifying a list

- (1) Click on <Manage Lists>
- (2) The window designed for managing distribution lists opens; it displays the distribution lists which you have access to.



List name	Creation date	List type	Actions
rr list unité	17/11/2008	DG	   

You can perform the following actions: add, view (display), modify, copy and delete a list.

1. Creating a list


- (1) Click <Manage lists>, then <Add>. The following screen appears:

The screenshot shows a web application interface for managing distribution lists. At the top, there are fields for 'Sent by *' with sub-fields for 'I / E', 'Name - First Name', and 'Organisation / Service'. Below this is the 'Recipient(s) *' section, which includes a 'Distribution list' dropdown, 'Add list', 'Display list', 'Manage List' (highlighted with an orange box), and 'Copy' buttons. The main content area is titled 'Distribution list(s) of kacieem' and contains an 'Add' button. Below the title, it states '173 item(s) found, displaying 1 to 10.' and provides pagination controls. A table lists the distribution lists:

List name	Creation date	List type	Actions
CAD	01/04/2009	Personal	[Icons for actions]
-TO-CHEFS D'UNITE	01/04/2009	Personal	[Icons for actions]

- (2) Fill the screen:


The screenshot shows the 'Lists of kacieem' screen. The 'List details' section includes a 'Template name' text field and a 'Template type' dropdown menu set to 'PERSONAL'. The 'Entities' section features a table with columns: 'to/cc', 'Name - First Name', 'Organisation / Service', and 'Up/Down'. The 'to/cc' column has radio buttons for 'to' and 'cc', and a dropdown for 'int'. The 'Name - First Name' and 'Organisation / Service' columns have text input fields and search icons. At the bottom are 'Cancel' and 'Save' buttons.

- Give a name to your list in the '*Template name*' field.
- Depending on your rights in Ares, select the *Template Type*, i.e. the accessibility of your list (by yourself, by your unit, by your department, or by the whole DG).
- Add the desired persons or organisations to the list. For each one,
 - (a) select *To* or *Cc* depending on whether he/she is usually the main recipient of the mails or in copy. This may then be modified on a case-by-case basis.
 - (b) select the *Int* field to find a person belonging to the Commission. Select the *Ext* field to find a person or organisation not belonging to the Commission.
 - (c) use auto-complete or the search  icon to enter the name of the person or the organisation.

- (3) When the list is complete, click on <Save> or <Cancel>.

- (4) The newly-created list appears in the '*Distribution List*' window.









2. Displaying a list

- (1) Click <Manage lists>
- (2) Click on the  icon beside the list you wish to display. The selected list appears.

Distribution list(s) of kacieem

Add Quit

172 item(s) found, displaying 1 to 10. Page(s): 1, 0... Item(s) per page: 10 Show all Search Clear

List name	Creation date	List type	Actions
CAD	01/04/2009	Personal	   
-TO-CHEFS D'UNITE	01/04/2009	Personal	   

- (3) Click on <Exit> to return to the *Distribution List* window.

or

- (1) When creating/modifying a document, select the list you want to see the details:

Recipient(s) *

Distribution list

-TO-CHEFS D'UNITE

CAD


-TO-CHEFS D'UNITE

Add list Display list Manage List Copy

to/cc I / Organisation / Service

- (2) Click <Display list>










3. Modifying a list



- (1) Click <Manage lists>
- (2) Click on the  icon beside the list you wish to modify. The selected list appears.

Distribution list(s) of kacieem


Add Quit

173 item(s) found, displaying 1 to 10. Page(s): 1, 0... Item(s) per page: 10 Show all Search Clear


List name	Creation date	List type	Actions
CAD	01/04/2009	Personal	   
-TO-CHEFS D'UNITE	01/04/2009	Personal	    











- (3) You can modify the following information: rename the list, change its accessibility (make it a personal list or extend access to the unit, the department or the whole DG), To/CC, add names (using auto-complete or the search icon ) or delete names using the  icon.
- (4) Click on <Save> to save the modifications or on <Cancel> to cancel them.



4. Copying a list

- (1) Click <Manage lists>
- (2) Click on the  icon beside the list you wish to copy.


Distribution list(s) of kacieem

173 item(s) found, displaying 1 to 10.  Page(s): 1, 0... Item(s) per page: 10


List name	Creation date	List type	Actions
CAD	01/04/2009	Personal	    
-TO-CHEFS D'UNITE	01/04/2009	Personal	     <input type="button" value="Modify"/>











- (3) A new list appears listing the contacts that were copied.
- (4) Give this list a name.
- (5) Specify its accessibility (make it a personal list or extend access to the unit, the department or the whole DG).
- (6) You can modify this list: To/Cc, add names (using auto-complete or the search  icon) or delete names using the  icon.
- (7) Click on <Save> to save the modifications or on <Cancel> to cancel them.

5. Deleting a list

- (1) Click <Manage lists>
- (2) Click on the  icon beside the list you wish to delete. A confirmation message appears.

Distribution list(s) of kacieem

173 item(s) found, displaying 1 to 10.  Page(s): 1, 0... Item(s) per page: 10

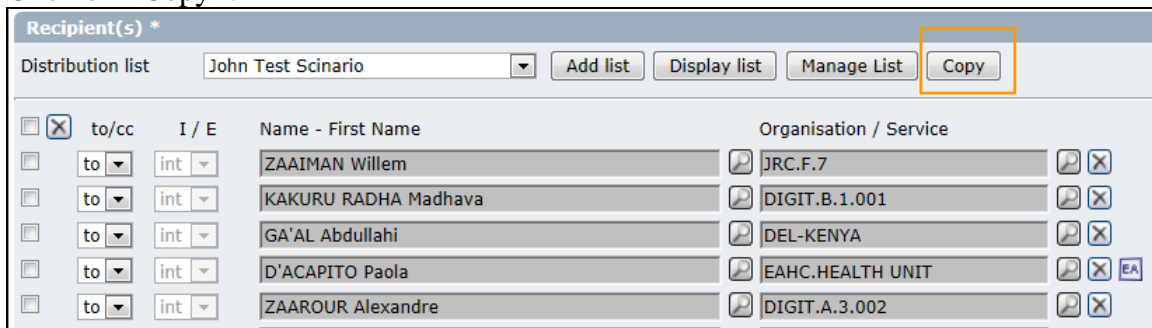
List name	Creation date	List type	Actions
CAD	01/04/2009	Personal	    
-TO-CHEFS D'UNITE	01/04/2009	Personal	     <input type="button" value="Modify"/>

- (3) This disappears when you confirm it.



2.7.4. Creating a list based on the recipients of a document

- (1) Enter data in the 'Recipients' field in the document.


- (2) Click on <Copy>.



<input type="checkbox"/>	<input checked="" type="checkbox"/>	to/cc	I / E	Name - First Name	Organisation / Service	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	to	int	ZAAIMAN Willem	JRC.F.7	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	to	int	KAKURU RADHA Madhava	DIGIT.B.1.001	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	to	int	GA'AL Abdullahi	DEL-KENYA	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	to	int	D'ACAPITO Paola	EAHC.HEALTH UNIT	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	to	int	ZAAROUR Alexandre	DIGIT.A.3.002	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- (3) A window for managing your distribution lists opens, displaying a new list of the contacts that have been copied.
- (4) Give this list a name.
- (5) Specify its accessibility (make it a personal list or extend access to the unit, the department or the whole DG).
- (6) You can modify this list: To/Cc, add names (using auto-complete or the search  icon) or delete names using the  icon.
- (7) Click on <Save> to save the modifications or on <Cancel> to cancel them.

Notes

- The rights to create (particularly at list visibility level) or to modify the distribution lists correspond to the authorisations (roles) given in your profile. Thus, if you do not have the correct role, you cannot extend the visibility of your list to other users.
-  Always give your list a clear and relevant name so that you can find and use it again easily.
- In the list managing window you can select each column clicking on the title. Please take into account that the selection will be done on each page. If you are in the second page and you ask for a selection you will be redirect to the first one.

See also

Recovering entities

2.8. Registering a document

Context

The purpose of registering a document drawn up or received is to¹⁸:

- identify the document in question with certainty
- certify that the document concerned, which fulfils the established or generally recognised minimum requirements within the Commission regarding form and has been presented for registration in accordance with the established or generally recognised procedures within the Commission departments, has been transmitted by an author to an addressee at a given date as incoming or outgoing mail or by its incorporation into an archiving/record-keeping system.

In other words, registration recognises the value of a document for the Commission: a registered document is a document that commits the Commission or one of its departments as it falls within its competence.

All profiles are able to register documents, except 'base' and 'noAresaccess' profiles. Indeed you need to view the <Register and Send> pushbutton on the Ares interface to register.



An internal document registered in ARES is sent automatically via ARES. Therefore, you must not send it also by e-mail to the ARES users.

Method

- (1) Open the document you want to register.
- (2) Enter or modify (in the case of a document already saved) the data in the fields on the screen for entering the details of the document to be registered.
- (3) Click on <Register and Send>.

¹⁸ Cf Document registration manual:
https://myintracomm.ec.europa.eu/corp/sg/en/edomec/doc_management/Documents/edomec_inshort_en.pdf

- (4) The document receives an *ARES* registration number (ex: Ares(2012)1515). The metadata of your document is listed in the *Identification* area of your document.

- (5) After each registration, Ares automatically converts each attachment in pdf (if the original file can be converted in pdf). Thus two different file formats will be available: the original format (ex: Word, Rtf...) and the rendered pdf format. The stamp (made from the registration number and the registration date) will be put automatically on the pdf copy. The pdf file will be 'ocerised' meaning it will be possible to perform a text search on it.


	Type	Ares	Native	Lang.
	Main document			ET
	expansionnisme.doc			

Notes

- A warning is displayed when a user tries to register a document whose e-signatory has not been launched. It then prevents registration of documents with no proper signatory.




- Pdf conversion: not all formats can be converted into OCR PDF.
 - ✓ Only the following source formats are converted in Ares: MS Word 97, 2000, XP and 2003 (MS Word 95 also, with some limitations) , MS Excel 97, 2000, XP and 2003, MS PowerPoint 97, 2000, XP and 2003, TIFF, BMP, GIF, JPG, PDF, Standard Text, RTF (Rich Text Format), Text files.
 - ✓ .msg files with macros or Office 2007 documents (.docx, .xlsx...) are never

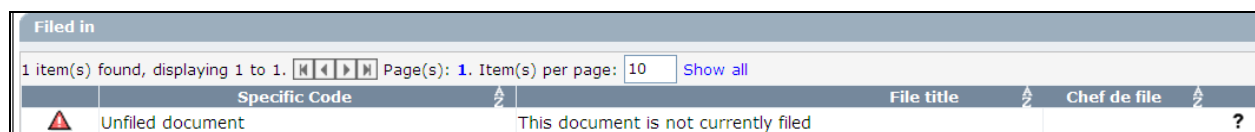
converted in Pdf.


- ✓  Files whose size is less than 15Mb are directly converted. Conversion of files between 15 Mb and 50 Mb are available after 7 PM. Files whose size exceeds 50 Mb are never converted.
- When a document is registered, the previous versions of attachments (visible under the icon) are only accessible to the creator of the document and the E-signatory actors.
- The mandatory fields for registration are: the attachment, the date of the document, the title, the sender(s) and the recipient(s). If one of the these fields does not contain the required data, an error message appears when you try to register:




A screenshot of a web form titled 'Titre/Objet' with a text input field. Above the field, a red error message box states: 'Some values are invalid. They are marked with a warning icon.' To the right of the input field, there is a small warning icon and an asterisk.

-  Once a document has been registered, it becomes read-accessible not only to its creator and the workflow participants (assignment and e-Signatory) but also to the sender(s) and recipient(s).
-  Once registered the document may only be modified by the person with the appropriate role (with 'DMO' or 'CAD' profile). The document may be modified only in exceptional cases. The person authorised will thus have access to <Modify Special> and must provide due justification for the modification¹⁹.
-  Every document registered must be filed. If the document has not yet been filed, a reminder appears so that you can do that now:



Filed in			
1 item(s) found, displaying 1 to 1. Page(s): 1. Item(s) per page: 10 Show all			
	Specific Code	File title	Chef de file
	Unfiled document	This document is not currently filed	?

-  If you register a document with pending e-signatory tasks, the system closes automatically all unclosed tasks. You however receive a warning and have the possibility to send an 'INFO' task to the concerned persons.

See also

¹⁹ Please consult 'Ares administration user guide' for more information about the modification of registered documents.

Registering a document

Filing a registered document (mandatory).

2.9. External transmission

Context

When you register a document in Ares, the **internal recipients** who are active Ares users automatically receive the document in their 'received documents' box.

The creator may also choose to send a registered document by SMTP server to an **external recipient or to inactive Ares users or those with 'no Ares access' profile**. This is neither an automatic nor a compulsory operation: when the system detects at least one external recipient, the person who registers the document is reminded about the possibility to send it via e-mail. Please note that the external transmission is only done by email (never by fax for example) and can only take place once all attachments have been converted into PDF after registration.

The external transmission is available to the creator of the document and to the actors and manager of the e-signatory at any time after registration. The metadata of the registration are included in the body of the e-mail to be sent and can be modified before sending.

Method

- (1) If you have at least one external recipient or an inactive/'no ares access' user, after clicking on <Register and Send>, on the confirmation window, the system offers you the external transmission.

Document Filing Assignment e-Signatory Link

CONFIRMATION

Are you sure you want to register ? Registration is an irreversible operation. After that you will not be allowed to change anything in the registered document.

Your document contains at least one external recipient. The transmission to the external recipient(s) is not an automatic process. For external transmission use "External Transmission" functionality present in the document actions after document registration.

Filing

The system has detected that the document has not yet been filed. Here are the filing options :

☒ File immediately

☐ File later

☐ Assign the filing task to:

Summary

- (2) If you want to use this function, click on the tab '*External transmission*'.

Document Filing Assignment e-Signatory Link **External Transmission**

Identification

Registration number : Ares(2010)1996 Save number : digit.b.1.001(2010)4371 Registration date : 08/10/2010

Title : Contrats iop 7892

Type	Ares	Native	Lang.	External ref.	Size	Version
Main document			NS		0.05 MB	

Doc Actions

- Copy
- Answer
- Modify special
- Print
- Send link
- Add translation

External Transmissions

Send to External

Messages

Info: No transmissions were created for this document. Click "Send to External" to create one.

(3) Click the button <Send to External>.

(4) A template of an email is drafted (all blank fields may be modified, contrary to the grey ones):

Document Filing* Assignment e-Signatory Link **External Transmission**

Identification

Registration number : Ares(2013)389 Title : présentation

Main document

External Transmissions

Send to External

Messages

Info: No transmission

Transmission Creation -- Webpage Dialog

Send Cancel

From: KACI Emilie (DIGIT.B.1.001)

To: LANNOYE Xavier (DIGIT.A.3.001) Xavier.LANNOYE@ext.ec.europa.eu

Bcc: KACI Emilie (DIGIT.B.1.001)

Subject: Ares(2013)389 -

This is a test message from Ares. Please ignore the content. présentation nouvelle version

Ceci est un message de test de l'application Ares. Merci d'ignorer le contenu.
Veuillez trouver ci-joint le document Ares(2013)389 concernant "présentation nouvelle version" envoyé par M/Mme KACI Emilie le 18/07/2013.

This is a test message from Ares. Please ignore the content.
Please find attached document Ares(2013)389 regarding "présentation nouvelle version" sent by Mr/Ms KACI Emilie on 18/07/2013.

Note: This e-mail was automatically generated by the European Commission's central mail registration system. Replies by e-mail must be addressed to the original sender KACI Emilie (mailto:Emilie.KACI@ext.ec.europa.eu).
Remarque : Cet e-mail a été généré automatiquement par le système d'enregistrement central du courrier de la Commission européenne.
Toute réponse éventuelle par e-mail doit être adressée à l'expéditeur en personne, à savoir KACI Emilie (mailto:Emilie.KACI@ext.ec.europa.eu).

Attached files




ADMIN_ares_FR.pdf (1.6 MB) delete



The sending process can be asynchronous depending on the stamping/conversion of all PDF/OCR attachments. External transmission will be sent by the system when all the attachments have been stamped.

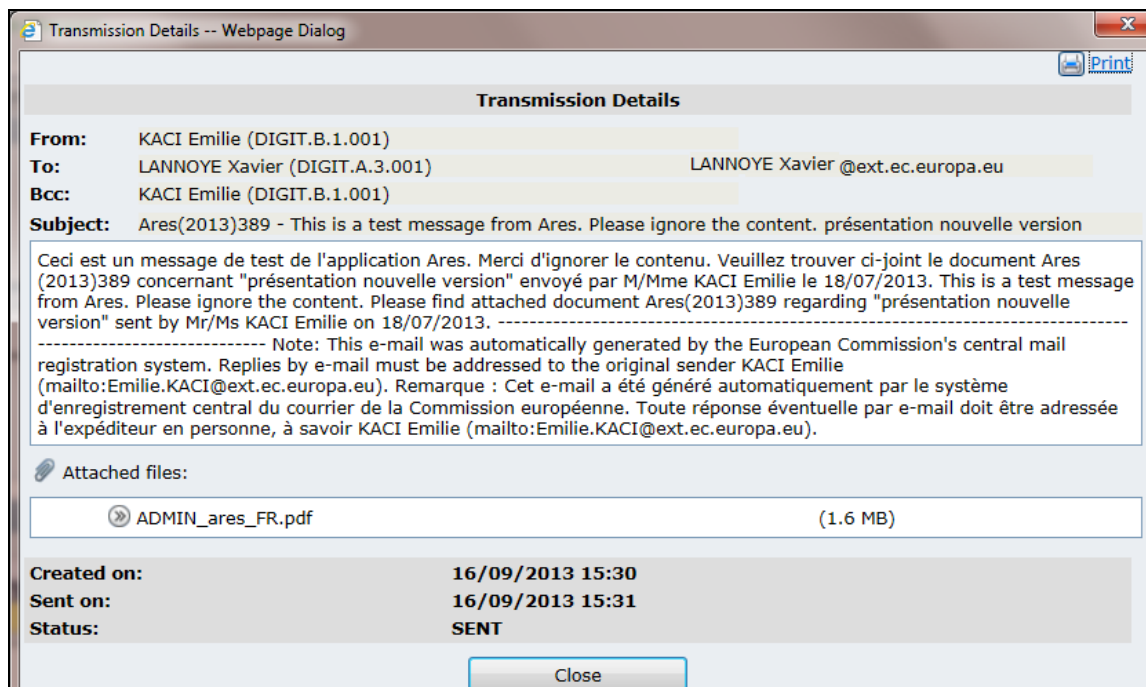
– 'From': sender of the email. This data cannot be modified or deleted. The sender of the email is the ECAS user of the person who will use the external transmission.



I.e. if you are working on a delegation or a virtual entity, your name will be displayed. Indeed the sender of the email may be different from the sender of the Ares document.

- 'To/cc': all external recipients taken from the Ares document. If you do not want a recipient to receive the document by email, delete it. Check the corresponding emails and modify them if there is an error or you want to modify the email. If several emails are available for the same person (for example if there is an email for the person and an email for the organisation) choose the proper one from the drop-down list.  The system takes the emails from the data of the external entity. If that data is empty, you will have to type it manually.
 - 'BCC': the sender of the email (identical to the 'from' field-ECAS user) will receive the email in Outlook in bcc. This data cannot be modified or deleted.
 - 'Subject': Title of the Ares document. The sent email will contain this title and the registration number.
 - *Body of the email*: A pre-formated text is proposed but you may modify it.
 - 'Attachment': click on <delete> to take off the attachments you do not want to send out.  Only the pdf attachments will be sent out with the email. Please note then that the transmission of the email may be asynchronous: indeed the email will only be sent out when the attachments are converted in pdf. (see warning below)
- (5) Click on <send>.
- (6) The status of the transmission is displayed. If you click on the icon , under 'Message' column, you see the sent email or the error message:

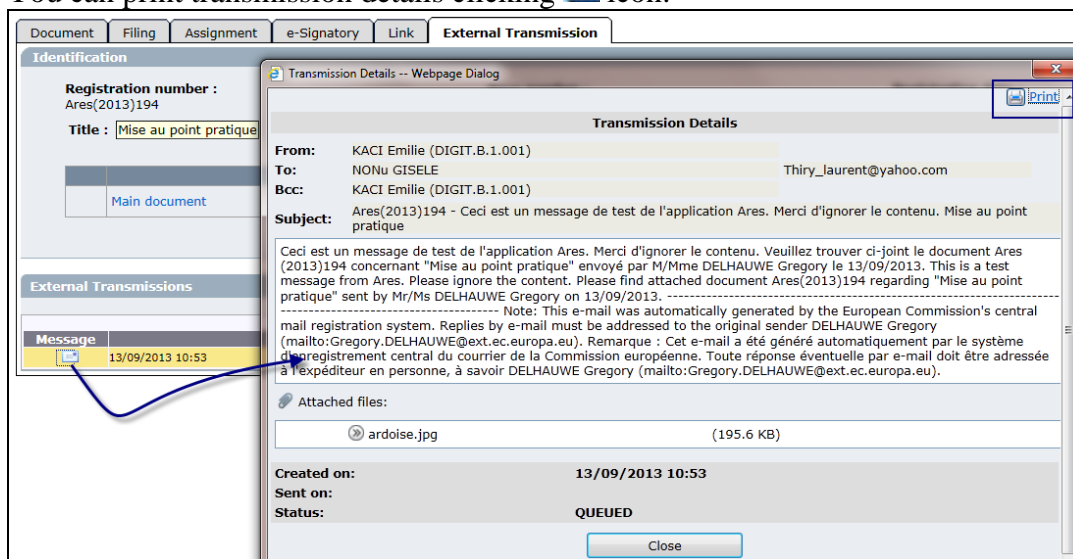
External Transmissions					
Message	Created on	Created by	Status	Sent on	Action
	16/09/2013 15:30	KACI Emilie (DIGIT.B.1.001)	QUEUED		



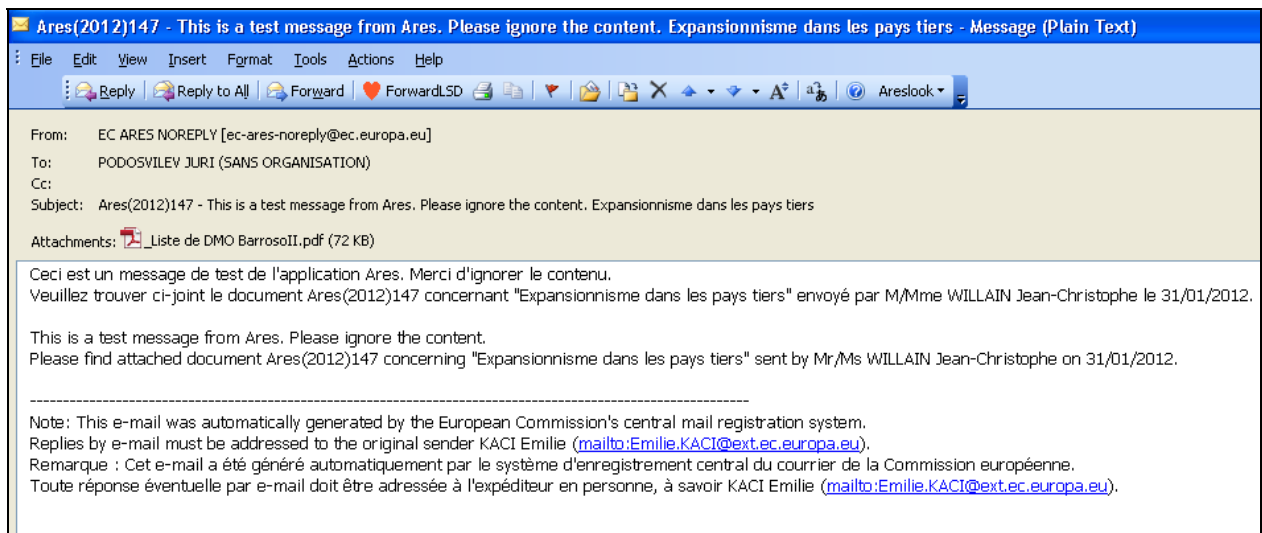
- (7) After the sending, it is still possible to do a follow-up of the transmission and to do a new transmission to other recipients by clicking on the button <Send to external>.

Notes

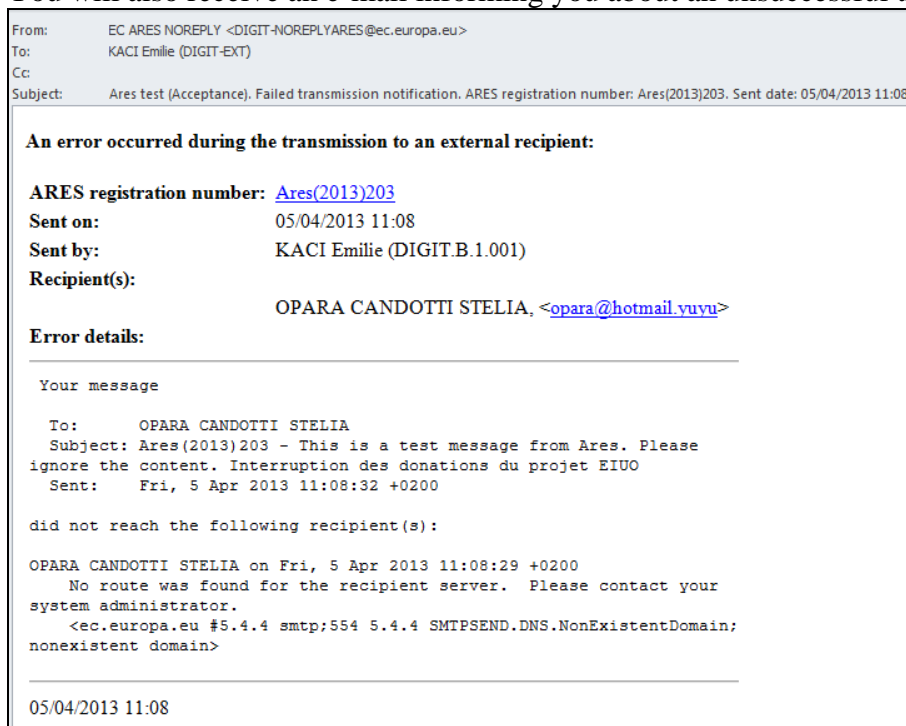
- You can print transmission details clicking  icon:



- Ares number is put in the email title, at the beginning of the subject
- When the email is sent out, the sender is EC ARES NO REPLY. The name of the sender (for the answer for example) is put in the email body:

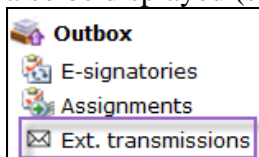


- As the email is sent through SMTP, you will not have the email in your sent items of Outlook.
- You may cancel a transmission if its status is pending. (Click on).
- You will also receive an e-mail informing you about an unsuccessful transmission:



- 'Out of office' status and 'Delivery notice' are not handled by the external transmission workflow.
- The total size of attachments cannot exceed 10 MB when using 'external transmission'. The same limitation is also in place with Areslook

- You can now consult your 30 most recent transmissions (successful and failed), clicking on 'Ext. transmissions' from the 'Outbox' menu. E-mails sent and registered through Areslook will also be displayed (see module 10 for details):



2.10. Duplicates

Context

When creating your document, Ares can check if multiple records of documents have been created (with identical characteristics). This function allows the detection of duplicates at the level of registered documents, not at the level of saved documents. All the existing documents will be taken into account for the check, even the documents the user does not have access to. (the documents from his DG and from the other DGs).

A duplicate is indicated when the three following conditions are fulfilled in the document you are creating and in the other documents:

- the title should be identical
- The documents' dates should be identical
- For incoming documents: same sender, for outgoing documents: same recipient and for internal documents: same sender or recipient

The field '*comments*' will be also taken into account.

Method

(1) Click on <Register and Send>. Ares checks whether any similar documents exist.

(2) If duplicates might exist on that document, the following message is displayed:

Duplicate(s)				
List of similar document(s) found				
1 item(s) found, displaying 1 to 1.				
Registration number	Registration date	Registration author	Service registration author	Telephone registration author
Ares(2012)147	31/01/2012	KACI Emilie	digit.b.1.001	80907
<input type="button" value="Modify"/> <input type="button" value="Save"/> <input type="button" value="Ignore"/>				

(3) Document details are displayed should you click on the title of the document. You may then modify the document being entered or replace it, simply save it or ignore the

duplicate found and register it.

Preview duplicate					
Registration number : Ares(2012)147		Save number : digit.b.1.001(2012)255		Registration date : 31/01/2012	
Title : Expansionnisme dans les pays tiers					
Actions		Attachment name		Date	Lang.
		_Liste de DMO Barros011.doc (Read only version)		31/01/2012	
I/E	Sent by	Service/Organisation		I/E	TO/CC
I	WILLAIN Jean-Christophe	(DIGIT.B.1.001)		E	TO
					Received by
					PODOSVILEV JURI
					Service/Organisation
					(SANS ORGANISATION)
Mail type : Outgoing					
Received date :					
Creation date : 31/01/2012					
Level of sensitivity : Normal					
Marking Expiration Date :					
Comments :					
Document date : 31/01/2012					
Sent date : 31/01/2012					
Creator :					
Marking :					

2.10.1. Modifying the document

- (1) Click on <Modify>. The details of the document being entered are displayed.
- (2) Modify it and click on <Register and Send>.
- (3) The document is then registered with the modifications

2.10.2. Saving the document

- (1) Click on <Save>.
- (2) The document being entered receives a save number (ex: digit.b.2(2012)1234)

2.10.3. Ignoring the duplicate found

- (1) Click on <Ignore>
- (2) The document being entered receives a registration number (ex: Ares(2011)78978)

Note

Duplicates are detected on the basis of following metadata: last name/first name of the sender/recipient, name of organisation/department of the sender/recipient, title and date of document. If the user does not have access to the document, a message appears with just the registration number and the creator department so that the user can contact that department to see whether or not it is a duplicate.

2.11. Filing a registered document (mandatory)

It is not mandatory to file a saved document but it is recommended.



Filing a registered document is mandatory. Therefore, if the document has not yet been filed, a reminder appears when you try to register it.

Document | Filing | Assignment | E-Signatory | Link


CONFIRMATION
Are you sure you want to **register** ? **Registration is an irreversible operation. After that you will not be allowed to change anything in the registered document.**

Filing


The system has detected that the document has not yet been filed. Here are **the filing options** :

☒ File immediately

☐ File later

☐ Assign the filing task to: 

You can only file in the files for which you have adequate rights.

 As soon as a document is filed in a file (whether this document is registered or saved), access to the document is extended to all the persons who have the *File Reader* right for this file. **It is the filing that determines the (extended) visibility of the document.**

In order to preserve DG visibility, SG-Edomec highly recommends that the document be filed immediately after its registration or, failing that, within a maximum of five working days.




2.11.1. Filing immediately

Context

You immediately file the document which you want to register.



Method

- (1) Click on <Register and Send> for the document.
- (2) During the registration confirmation, a filing reminder appears.
- (3) Select <File immediately> checkbox.
- (4) Click on <Confirm>
- (5) The document registration is automatically confirmed and a unique registration number:
ex Ares(2012)7878
- (6) Search for the desired File on the *Favourites*, *Search* or *Filing Plan* tab page.


Filed in				
1 item(s) found, displaying 1 to 1.  Page(s): 1. Item(s) per page: 10 Show all				
Specific Code	File title	Chef de file		
 Unfiled document	This document is not currently filed			

- (7) Select a file in the list to file using the  icon to file in a 'File' or  to file in a 'Sub-File'.

- (8) A line corresponding to the file appears in the document. A star is now displayed on the tab 'filing' meaning that the document has been filed. The other users can now quickly see whether the document has been filed. (even if the users do not see the concerned filed).

Filed in				
1 item(s) found, displaying 1 to 1. Page(s): 1. Item(s) per page: 10 Show all				
Specific Code	File title	Chef de file		
AG/MAN/STAFFREL/DG 0014	Affaires générales DG 2008	digit		

Note

The red file  indicates that the file is limited meaning the security of the file is no longer the security by default. Indeed the access to the document has been limited in the files' roles and the 'limited' box has been ticked.

See also

Filing from favourite files

Finding existing files

Filing from the filing plan

2.11.2. Filing later

Context

You choose to postpone the filing of the document to register.

Method

- (1) Click on <Register and Send> for the document.
- (2) During the registration confirmation a filing reminder appears.
- (3) Select the <File later> checkbox.
- (4) Click on <Confirm>.
- (5) The document registration is automatically confirmed and a unique registration number (ex: Ares (2012) 787).

Notes


- In the 'Assignment' tab page, verify that the filing task is displayed in your name.
- In the **Tasks** menu, check that the filing task is there.

2.11.3. *Assigning the filing to another person*

Context

You choose to delegate the filing of the document to register to a third person.

Method

- (1) Click on <Register and Send > for the document.
- (2) During the registration confirmation a filing reminder appears.
- (3) Select <Assigning the filing to another person>.
- (4) Enter the name of the person who will have a filing task () and click on <Confirm>.
- (5) The document registration is automatically confirmed and a unique registration number (ex: Ares(2011)78789).

Notes

- On the '*Assignment*' tab page, verify that the filing task is displayed in the name of the person chosen.
- A filing task appears in the **Tasks** menu of the user concerned. This user may be an internal entity or a virtual entity (e.g. a functional mailbox).

See also


Recovering entities

Seeing what assignments do: tasks, deadlines

2.11.4. *Not to be filed documents*

Context

When you are recipient/ you have received an assignment task on a registered document sent by another DG, you do not have to file the document again. Indeed it is the responsibility of the DG that has sent to document to file it. Or for example for personal documents sent to you by PMO.

In that case, a button <Not to be filed> is displayed on the tab '*filing*'.  If you click that button, you will not have a reminder to fill the document. The stakeholders of the document (creator, sender(s), recipient(s) and actors of the workflow) have access to the document.

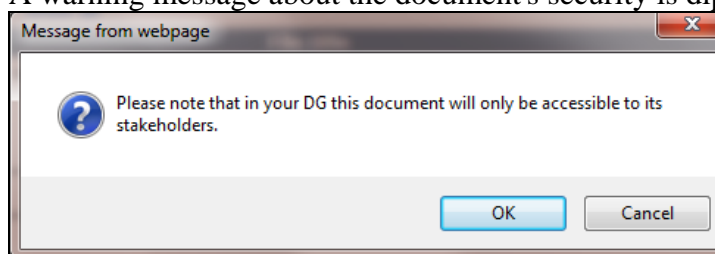
You still have the possibility to file the document and thus give access to the '*file readers*' to that document. File the document through the usual filing methods (from favourites, search or filing plan). As soon as the document is filed, the <Not to be filed> button disappears.

Method

- (1) Click on the <Not to be filed> button:



- (2) A warning message about the document's security is displayed:



- (3) Click <OK> to continue: the filing tab will then remain empty and you will not received a reminder to file the document or <Cancel> and file.



Note

The <not to be filed> documents will not be taken into account in the DMO reports (registered unfiled documents).

2.12. Copying a document

Context

Ares gives you the possibility to copy documents. Some metadata are copied from a document to prepare a brand new one.

You can select the metadata to be copied. The title, sender, recipients and the filing are ticked by default but may be unticked manually:

- '*Document*' tab metadata: you can copy the title, the sender, the recipients, the comments and the stamp
- '*Filing*': the copy document can be automatically filed in the same file(s) as the original document if the creator of the copy document is at least 'file user' on the corresponding files and if this file is 'active'.
- '*E-signatory*': E-signatory tasks of the original document can be copied. Tasks will be then saved (the tasks will not be launched). You can then modify or delete any task. Instructions and comments will also be copied..
- Original link(s)



The following metadata will never be copied: 'not to be filed' option (filing), assignments, dates and attachments.

Method

- (1) Press <Copy> under the '*Doc actions*' at the top right:

The screenshot shows a document management interface with tabs: Document, Filing, Assignment, e-Signatory, Link, and External Transmission. The 'Document' tab is active, showing 'Identification' details. The 'Doc Actions' menu is open, with 'Copy' highlighted. Below the menu, there are tables for document details and a summary of metadata.

Type	Ares	Native	Lang.	External ref.	Size	Pages	Version
Main document			NS		0.08 MB	2	

I/E	Sent by	Service/Organisation	I/E	TO/CC	Received by	Service/Organisation
I	WILLAIN Jean-Christophe	(DIGIT.B.1.001)	E	TO	PODOVILEV JURI	(SANS ORGANISATION)

Mail type : Outgoing
 Creation date : 31/01/2012
 Creator : KACI Emilie
 Register author : KACI Emilie
 Level of sensitivity : Normal
 Document encrypted : No
 Encryption Expiration Date :
 Comments :
 Signed by :

Document date : 31/01/2012
 Sent date : 31/01/2012
 Marking :
 Marking Expiration Date :
 Person concerned :

- (2) Tick the metadata you would like to copy:

Select information to copy

Metadata

☒ Title

☒ Senders

☒ Receivers

☐ Comments

☐ Marking

☒ Filing

☐ E-signatory Tasks

☐ Instructions

☐ Links

- (3) Fill in the fields of the new document (you can modify each field).
- (4) Then click <Save> or <Send and register>.
- (5) In 'document copy details' panel, you see the information copied:

Document | Filing | Assignment | e-Signatory | Link

Identification

Document copy details:

Type	Mes
<input checked="" type="checkbox"/> Document filed in all files	

Identification

Save number :
digit.b.1.001(2012)258

Title : Expansionnisme dans les pays tiers

Type	Actions	Native	Lang.
No file imported			

I/E	Sent by	Service/Organisation	I/E
I	WILLAIN Jean-Christophe	(DIGIT.B.1.001)	E

Mail type : Outgoing
Creation date : 31/01/2012


Notes

- 'E-signatory': if the original document was registered directly after the copy, the e-signatory can not be copied. If the original tasks had not been launched, the tasks will be copied though.
- If an original sender or recipient has left the Commission or has changed post, he will be automatically deleted during the copy.

- The linked documents you do not have access to will not be copied.

2.13. Sending the link of a document via electronic mail

Context

You can send a direct link to an Ares document to another person, via email.  Access rights on documents are checked: then the email recipient must have an authorized access on the document (at least reading access). If it is not the case, he will not be able to open the document.

Method

- (1) Open the document you would like to share.
- (2) At the right of the screen, under '*Doc Actions*', click <Send link>:



The screenshot shows the Ares document management interface. At the top, there are tabs: Document, Filing, Assignment, e-Signatory, Link, and External Transmission. The 'Document' tab is active. Below the tabs, the 'Identification' section displays the following information:

- Registration number : Ares(2012)109
- Save number : digit.b.1.001(2012)194
- Registration date : 20/01/2012
- Title : En réponse à votre courrier concernant la réduction des centrales nucléaires

Below the identification section, there is a table with the following columns: Type, Ares, Native, Lang., External ref., Size, Pages, and Version. The table contains one row with the following data:

Type	Ares	Native	Lang.	External ref.	Size	Pages	Version
Main document			NS		0.08 MB	2	

To the right of the table, there is a 'Doc Actions' menu with the following options: Copy, Answer, Modify special, Print, Send link (highlighted with a red box), Add translation, and Manage procedure.

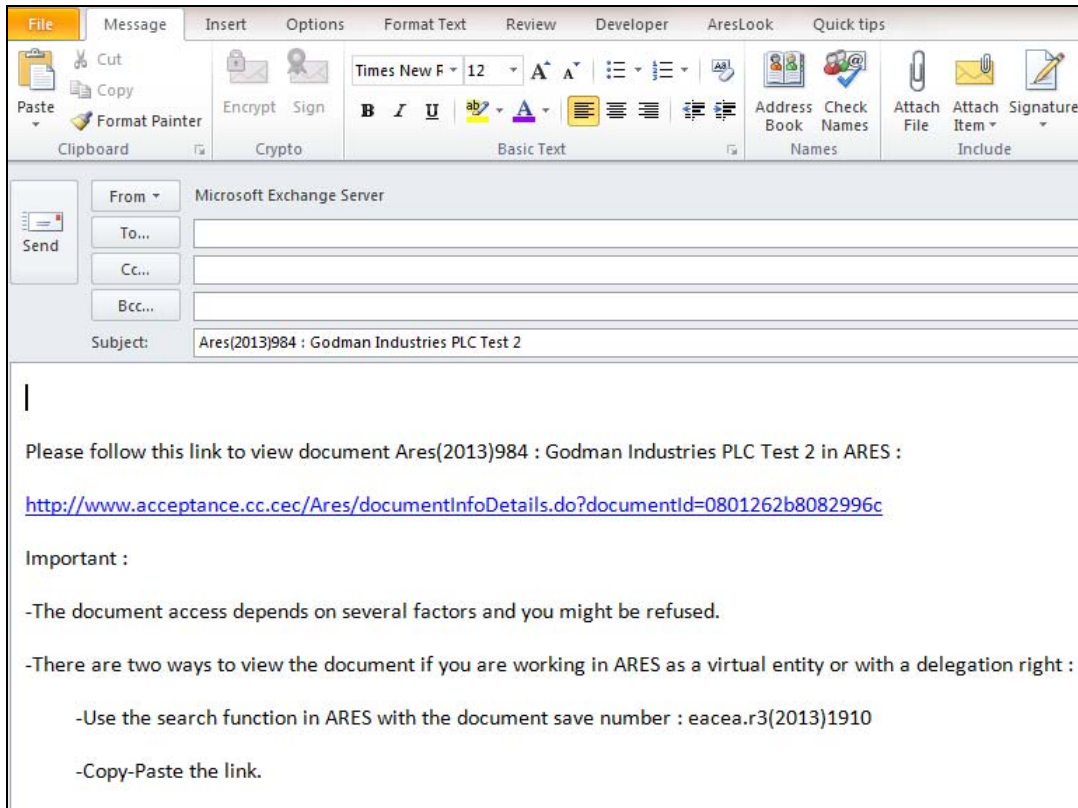
Below the 'Doc Actions' menu, there is a table with the following columns: I/E, Sent by, Service/Organisation, I/E, TO/CC, Received by, and Service/Organisation. The table contains two rows with the following data:

I/E	Sent by	Service/Organisation	I/E	TO/CC	Received by	Service/Organisation
I	SANDU Leontina	(DIGIT.B.1.001)	E	TO	EBEID GHADA	(SANS ORGANISATION)
			E	TO	REBORI MARIA	(SANS ORGANISATION)

Below the table, there is a section with the following information:

- Mail type : Internal
- Creation date : 20/01/2012
- Creator : KACI Emilie
- Register author : KACI Emilie
- Level of sensitivity : Normal
- Document encrypted : No
- Encryption Expiration Date :
- Comments : Modifié le 07-02-2012 11:37 par kacileem : Rajout d'un destinataire oublié.
- Signed by :
- Document date : 20/01/2012
- Sent date :
- Marking :
- Marking Expiration Date :
- Person concerned :

- (3) An email is automatically drafted in Outlook, with an hyperlink on the document. You simply need to add the recipient(s) and if necessary, modify the contents:




2.14. Adding a translation

Context

You can add a translation to a saved or registered document. A translation is always linked to a parent original document. An original document can also have several translations.

This action can be performed by:

- the document creator and to the current e-signatory actor (for saved documents).
- the document creator (for registered documents)

It is also possible to remove translations in a saved document (if the document is registered, only DMO/CAD profiles can perform that action).  If you delete a 'parent' attachment, all the linked translations will be automatically deleted.

Method

- (1) Under the 'Doc Actions' menu, click on <Add translation>:

The screenshot shows a document management interface with a top navigation bar containing 'Document', 'Filing', 'Assignment', 'e-Signatory', and 'Link'. Below this is a 'Doc Actions' menu with options: Copy, Answer, Modify, Print, Send link, Add translation (highlighted with a red box), and Manage procedure. The main area displays document details for 'Expansionnisme dans les pays tiers' (Save number: digit.b.1.001(2012)258). A table lists document types, with 'Main document' selected. Below this is a table for document history with columns: I/E, Sent by, Service/Organisation, I/E, TO/CC, Received by, and Service/Organisation. The first row shows a document sent by WILLAIN Jean-Christophe to PODOSVILEV JURI. At the bottom, there are fields for Mail type, Creation date, Creator, Register author, Level of sensitivity, Document encrypted, Encryption Expiration Date, Comments, Signed by, Document date, Sent date, Marking, Marking Expiration Date, and Person concerned.

- (2) Tick the attachment you would like to link the translation to:

The screenshot shows a dialog box titled 'Step 1: Select the attachment to which the translation should be added:'. It contains a table with the following columns: Attachment Name, Attachment Date, Language, External reference, and Support. The first row has a checkbox, '_Liste de DMO BarrosoII.doc', '31/01/2012', 'Unspecified', and 'Native elec.'.

- (3) Click on <Browse...> and add the translation:

The screenshot shows a dialog box titled 'Step 2: Specify the metadata and import the translation:'. It contains a table with the same columns as the previous dialog box. The first row has a checked checkbox, '_Liste de DMO BarrosoII.doc', '31/01/2012', 'Unspecified', and 'Native elec.'. Below the table, there are fields for Type (Translation), Attachment (with a 'Browse...' button), Attachment Name, External reference, Language (NS - Unspecified), and Support (Native electronic). An 'Add' button is at the bottom. A warning message is displayed at the bottom: 'Warning: Please indicate the language of the translation before adding the document. You may not remove or replace existing translation documents. Contact your DMO to remove translation documents.'

- (4) Click on <Add>.
- (5) Click on the '+' to view the translations.

Document	Filing	Assignment	e-Signatory	Link														
Identification																		
Save number : digit.b.1.001(2012)258 Title : Expansionnisme dans les pays tiers																		
<table border="1"> <thead> <tr> <th>Tra</th> <th>Type</th> <th>Actions</th> <th>Native</th> <th>Lang.</th> <th>External ref.</th> <th>Version</th> </tr> </thead> <tbody> <tr> <td></td> <td>Main document</td> <td></td> <td></td> <td>NS</td> <td></td> <td></td> </tr> </tbody> </table>					Tra	Type	Actions	Native	Lang.	External ref.	Version		Main document			NS		
Tra	Type	Actions	Native	Lang.	External ref.	Version												
	Main document			NS														
<div>Doc Actions</div> <div> Copy Answer Modify Print Send link Add translation </div>																		

Document	Filing	Assignment	e-Signatory	Link															
Identification																			
Save number : digit.b.1.001(2012)258 Title : Expansionnisme dans les pays tiers																			
<table border="1"> <thead> <tr> <th>Tra</th> <th>Type</th> <th>Actions</th> <th>Native</th> <th>Lang.</th> </tr> </thead> <tbody> <tr> <td></td> <td>Main document</td> <td></td> <td></td> <td>NS</td> </tr> <tr> <td></td> <td>Translation</td> <td></td> <td></td> <td>NS</td> </tr> </tbody> </table>					Tra	Type	Actions	Native	Lang.		Main document			NS		Translation			NS
Tra	Type	Actions	Native	Lang.															
	Main document			NS															
	Translation			NS															

Notes

- It is not possible to do a check-in/check-out on translations.
- To remove a translation in a saved document: click on 'modify'.
- To remove a translation in a registered document: you should contact your DMO/CAD.

2.15. Freezing of saved and filed documents

An automatic freezing of saved and filed documents occurred when no action had been performed for 3 months. It was then not possible to modify the document any longer and the e-signatories tasks were automatically closed.



That freezing is no longer performed. Documents are still frozen when the file is closed.

Frozen documents are quickly identifiable:

Document	Filing*	Assignment	e-Signatory	Link
Identification				
Save number : digit.b.1.001(2010)500 - FROZEN ⓘ				
Title : New encoding rules				
<div> Main document </div>				

This document is FROZEN because no activity for over 3 months and/or part of a closed file.

3. MODULE 3: MANAGING YOUR FAVOURITE FILES LIST

Context

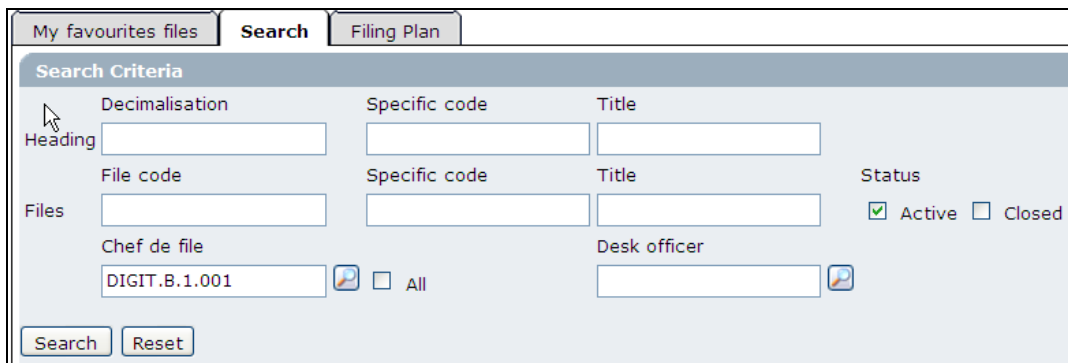
The favourite files list is useful for your everyday work in Ares, particularly during the filing process. This list allows you to keep a customised list of files currently in use without having to navigate in the filing plan or search in a list.


You must have the correct authorisations to perform these actions.

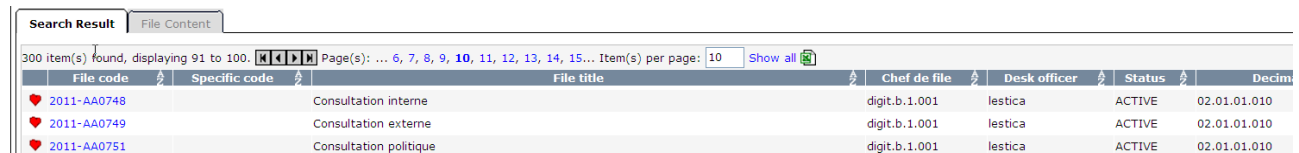
3.1. Adding a file to your list of favourite files




Method

- (1) From the *Files/Favourite files* menu, click on the 'Search' tab.



- (2) Enter your search criteria in the relevant fields. (Your department is entered in the *Chef de file* field by default. You can change this field if required.) Click on <Search> or press [Enter].
- (3) The system displays a list of the files. Select a file to add to your favourites using the  icon.



File code	Specific code	File title	Chef de file	Desk officer	Status	Decim
 2011-AA0748		Consultation interne	digit.b.1.001	lestica	ACTIVE	02.01.01.010
 2011-AA0749		Consultation externe	digit.b.1.001	lestica	ACTIVE	02.01.01.010
 2011-AA0751		Consultation politique	digit.b.1.001	lestica	ACTIVE	02.01.01.010

- (4) The file is added among your favourite files. Go to *Favourite Files* tab page to check.

Notes

- You can also add a file to your list of favourite files from the 'Filing' tab of a document.
- *Heading ... Decimalisation*: NOMCOM heading code

- *Heading ...DG code*: specific heading code defined by DG (does not exist in all DGs). This is the reference code which was given by the DG to headings in the filing plan before the NOMCOM code with its own decimalisation system existed.
- *Heading ... Title*: name of the heading
- *Files ... Specific code*: internal code for managing files given by the DG. This code may be a copy of the codes on paper files or part of a file identification system unique to the DG.
- *Files ... Chef de file*: the department responsible for the file
- *Files ... Desk officer*: the person(s) that work on the file. The desks officers belong to the service of the Chef de file. the department responsible for the file. You must type a login in that field.
- *File title*: name of the file. The file title itself must be concise, pertinent and understandable (regardless of how easy to read the documents actually filed there are)
- *Status*:
 - *Active*: currently being processes, possibility of filing new documents there
 - *Closed*: processing of this file has been completed and no more documents may be filed here

See also

Finding documents, files or tasks

3.2. Exporting your favourite files list

Context

You may export your list of favourite files in an Excel file. This file is useful if you want to file with Areslook for example.

In Ares you have two exportation possibilities:

Method

- (1) **From a document**: in the document details, click on the tab 'filing'. At the bottom of the screen, under the '*Favouites/My favourite files*' tab:

Document **Filing** Assignment e-Signatory Link External Transmission

Identification

Registration number :
Ares(2012)147

Save number :
digit.b.1.001(2012)255

Title : Expansionnisme dans les pays tiers

Type	Ares	Native	Lang
Main document			NS

Filed in

1 item(s) found, displaying 1 to 1. Page(s): 1. Item(s) per page: 10 Show all

Specific Code	File tit
Unfiled document	This document is not currently filed

Favourites Search Filing Plan

My favourites files File Content

Group by chef de file | Sort by file title |

digit.b.1

Concurrency

10.02.06.13.010.120.090.840.2010 JC

or from the menu 'Favourite files': click on the tab 'My favourite files':

My favourites files Search Filing Plan

Group by chef de file | Sort by file title | Sort by document registration date |

digit.b.1

Concurrency

10.02.06.13.010.120.090.840.2010 JC

digit.b.1.001

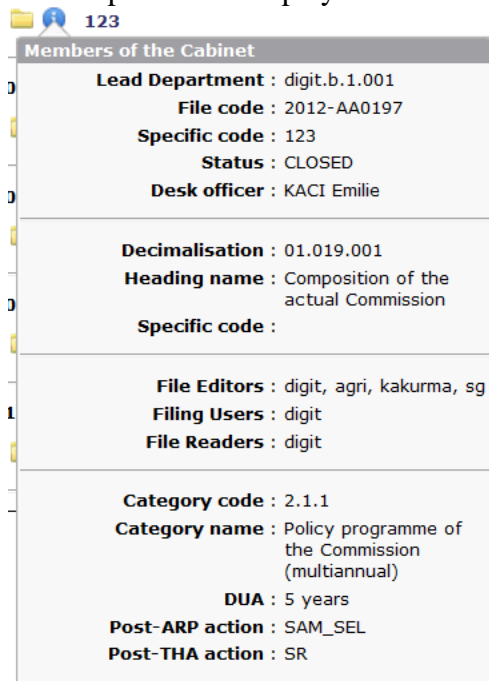
Ares test 1.4

(2) Click on the icon to export the list.

Notes

- The red file indicates that the file is limited meaning the security of the file is no longer the security by default. Indeed the access to the document has been limited in the files' roles and the 'limited' box has been ticked.

- A tooltip on a file displays all relative information, including retention policy information:



See also

Finding documents, files or tasks

4. MODULE 4: AVAILABLE ACTIONS FROM FAVOURITE FILES MENU

Context

Favourite Files menu offers you several possibilities: managing your favourite files, using one of your favourite files as a starting point for creating a new document or adding an existing document there. You can also quickly view the contents of a favourite file (sub-files and documents), navigate among documents and export data. A direct access to NomCom Is also provided.

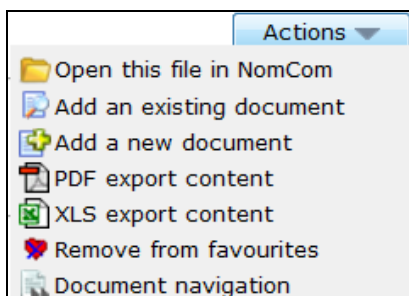
4.1. Opening a file in NomCom

Context

You also have the possibility to open a file in NomCom. The concerned item will then automatically be located in NomCom tree view and it gives you the possibility to perform any necessary operations on it.

Method

- (1) Click on *Favourite files* menu.
- (2) Click on <Actions> menu next to the concerned favourite file.
- (3) Click <Open this file in NomCom>:



You are automatically redirected to NomCom.

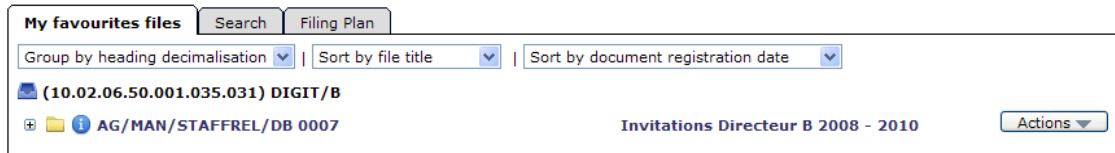
4.2. Creating a new document from a favourite file

Context




How to create a document in Ares from a favourite file.

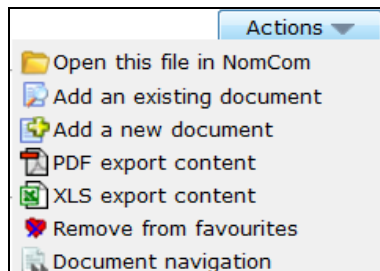
Method

- (1) Click on ***Favourite Files*** in the ***Files*** menu.
- (2) A screen listing your favourite files under the ***My Favourite Files*** tab is displayed:



You can add files to this favourite list either via the *Search* tab or the *Filing Plan* tab.




- (3) Click on  to view the detailed contents of the file.
 - (a)  : file or sub-file
 - (b)  : document filed in the selected file (or sub-file). Click this icon to view the document details.
- (4) Click on the button <Actions> under the file from which you would like to create a new document.

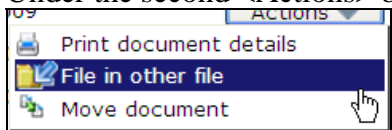





- (5) Select <Add a new document>.
- (6) This gives you the entry screen allowing you to create a new document.(See module 2 for the details of the creation of the new document).
- (7) Click on <Save> or <Register and send>.
- (8) The document will be automatically filed in the file chosen at the outset. You can check this by clicking on the *Filing* tab of the document in the ***Favourite Files*** menu.

Notes

- The  icon displays the information linked to the file, sub-file or document.

- You can export the list of documents contained in a file or a sub-file if you click on '  PDF export content' or '  XLS export content', under the upper <Actions> button.
- To delete a file from the list of favourite files, click on '  Delete from favourites'.
- Under the second <Actions> button, at the document level, you may:



- Print the document details 
- File the document in an additional file 
- Modify the existing file 

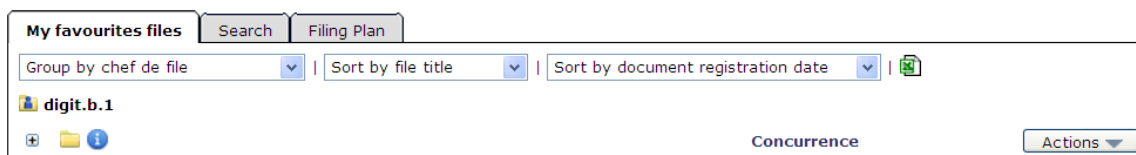
4.3. Adding an existing document from a favourite file

Context




How to add an existing document from a favourite file

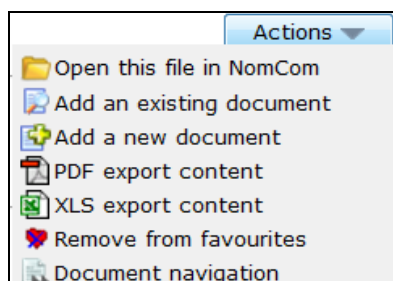
Method


- (1) Click on ***Favourite Files*** in the ***Files*** menu.
- (2) This gives you a screen listing your favourite files under the ***My Favourite Files*** tab.

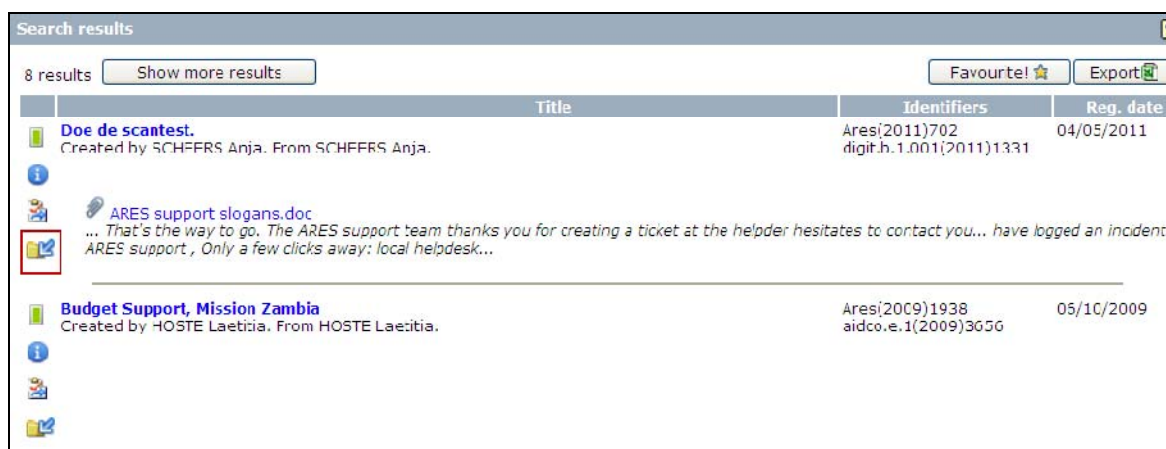


You can add files to this favourites list either via the *Search* tab or the *Filing Plan* tab.

- (3) Click on <+> to view the detailed contents of the file:
 - (a)  : file
 - (b)  : document filed in the selected file (or sub-file). Click on this icon to view the document details.
- (4) Under the upper <Actions> button, click on <  Add an existing document> on the file line to add an existing document to file it directly in the selected file.



- (5) The search screen opens. Enter the search criteria required to find the desired document and click <Search>.
- (6) The list of results appears. Click on the  icon to file the document in the chosen file. Click on the hyperlink on the title of the document to view the details:



- (7) From now on the document is displayed in your favourite file.

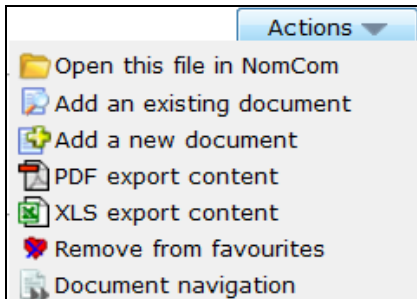
4.4. Exporting the content of a favourite file

Context

Vous pouvez exporter le contenu d'un dossier sous format Excel ou PDF.

Method

- (1) Click on *Favourite files* menu.
- (2) Click <Actions> button next to the concerned favourite file.
- (3) Click <Export content...> in the format you would like to have (PDF or Excel).



4.5. Deleting a file from the list of favourite files

Method

- (1) Click *Favourite files* menu
- (2) Click <Actions> button next to the concerned favourite file.
- (3) Click <Remove from favourites> option.

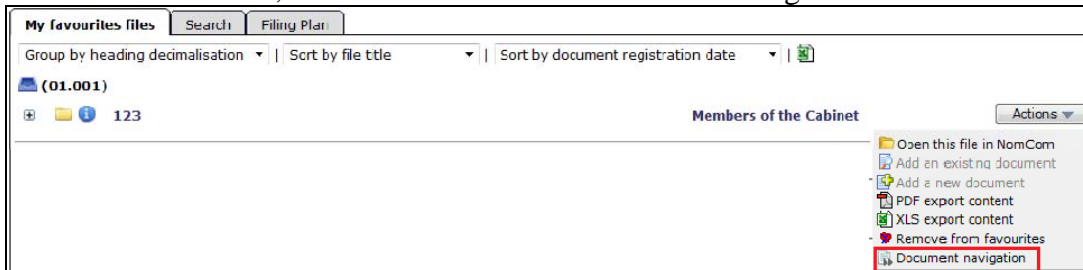
4.6. Navigating in the list of documents filed in a favourite file

Context

You can navigate in the list of documents filed in a selected file.

Method

- (1) In the '*Actions*' menu, click next to a file on <Document navigation>:



- (2) A new window will display all concerned documents: details of a selected document are displayed in the right section of the screen. Use the arrows on top of this section to leaf through the documents. You can open a document by clicking on its save number in the main document navigation pane:

2012-AA0197

Navigate in the pages

Excel export of all the documents

Modify the sorting of documents (sorted by default by "registration number")

25 documents displayed by default (modifiable)

Navigate in the documents displayed on the left

Title	Save number	Registration number	Registration date
RE, Demande d'accès aux documents.	digit.b.1.001(2010)540	Ares(2010)265	15/02/2010
Réorganisation de la DG ADMIN au 1er janvier 2010 (Implication de la DG DIGIT)	digit.b.1.001(2010)1184	Ares(2010)506	12/03/2010
envoi extérieur Emilie test	digit.b.1.001(2010)2420	Ares(2010)1211	10/06/2010
Contracts SocieteX and CE	digit.b.1.001(2010)3515	Ares(2010)1760	22/09/2010
RE, je	digit.b.1.001(2010)3708	Ares(2010)1814	27/09/2010
workflow 1.5.5.6	digit.b.1.001(2010)4338	Ares(2010)1992	07/10/2010
Test anne D rtf	digit.b.1.001(2011)12	Ares(2011)7	13/01/2011
Test pendant la grève	digit.b.1.dir(2011)826	Ares(2011)389	04/03/2011
RE, Pb areslook date	digit.b.1.001(2011)834	Ares(2011)396	04/03/2011
Test areslook presentation du 16032011	digit.b.1.dir(2011)1061	Ares(2011)549	16/03/2011
test gio class	digit.b.1.dir(2011)1549	Ares(2011)799	30/05/2011
Mail embedded	digit.b.1.001(2011)1999	Ares(2011)1037	22/09/2011
Politique d'expansion	digit.b.1.001(2012)183	Ares(2012)556	15/06/2012
test déclassement de dossier cloturé	digit.b.1.001(2012)397	Ares(2012)222	02/03/2012
test e sign exp edit save	digit.b.1.001(2012)622		
digit losc 4 ever	digit.b.1.001(2012)752	Ares(2012)399	27/04/2012
Invitation to the meeting	digit.b.1.001(2012)798	Ares(2012)422	07/05/2012

Click on a "save number" to open the related document in another Ares window

Details and attachment(s) of the document selected on the left panel

CONTRACTS SOCIETEX AND CE
 Registration number: Ares(2010)1760
 Save number: digit.b.1.001(2010)3515
 Registration date: 22/09/2010

ATTACHMENT(S)
 ANNEX(0.05 MB)
 COVER_LETTER(0.00 MB)

SENT BY
 [I] KACI Emilie (DIGIT.B.1.001)

RECEIVED BY
 [E] To - Edgard Klein (Société2010)

Level of sensitivity: Normal
Marking:
Marking Expiration Date:
Person concerned:
Signed by:
Creation date: 22/09/2010
Document date: 22/09/2010
Last modification date: 24/09/2012

Note

Documents navigation is also available in NomCom.

- The *Favourites* tab page: if you want to file the document in one of your other favourite files.
 - *Search* tab page: if you want to launch a file search.
 - *Filing Plan* tab page: if you want to search for a file via the filing plan.
- (5) The document is then automatically filed in the file.

See also


Files

5.2. Moving a document to another file

Context


How to move a document to another file: i.e. to file it somewhere else.

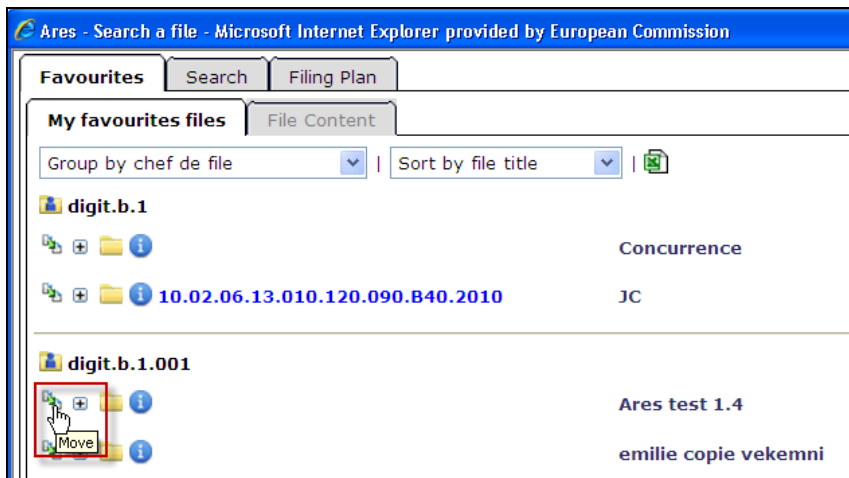
Method

- (1) In the *Files* menu, click on *Favourite Files*.
- (2) This takes you to the *My favourite files* tab page. Click on the  icon to open the file in which the desired document is filed.
- (3) The list of documents filed in the file is displayed. Under the <Actions> button, click on <Move document> next to the document which you want to re-file:



- (4) The system displays a list of your favourite files. Find the new file in which you want to file the document. You have several search possibilities:
 - The *Favourites* tab page: if you want to file the document in one of your other favourite files.
 - *Search* tab page: if you want to launch a file search.
 - *Filing Plan* tab page: if you want to search for a file via the filing plan.

- (5) When you have found the desired file, click on the  icon corresponding to this file:



- (6) The document is then automatically filed in the file and removed from the original file.

See also


Files

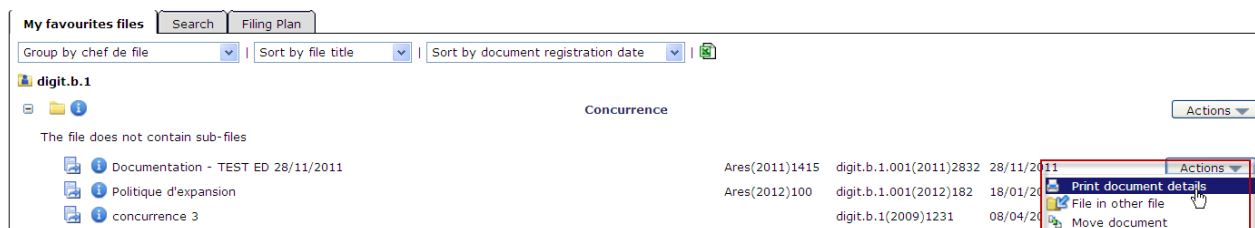
5.3. Printing the details of a document

Context


How to print the details of a document filed in a favourite file.

Method


- (1) Click on ***Favourite Files*** menu.
- (2) This takes you to the *My favourite files* tab page. Open the file () which contains the document that you want to print.
- (3) Under the <Actions> menu, click on <Print document details> button next to the concerned document: the *Detail Sheet* appears.

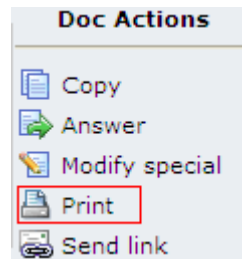


- (4) Click on the  icon to print it.

(5) Click on  (at the top right of the window) to close the *Detailed Sheet*.

Note

 You can also print the details of each document by clicking on the <Print> button at the right of the page listing the details.



6. MODULE 6: AVAILABLE ACTIONS FROM THE FILING PLANILE MANAGEMENT

6.1. Use and operation of the filing plan

Filing consists of organising registered documents into files, with these files in turn being sorted into a filing plan heading based on their area of activity.

The **filing plan** is thus a tool allowing documents and files to find their place in relation to each other and be logically re-findable and accessible.

The Commission's filing plan is in the form of a tree structure of **headings** that break down into a maximum of 8 levels:

- The **common nomenclature: 3 first levels** defined by the Secretariat General.
- The **Directorate-General specific levels**: maximum of **5 sub-levels** defined by the Directorates-General and Services. Each Commission DG and department should have a filing plan linked to the common nomenclature: they are responsible for the headings from their area of activity.

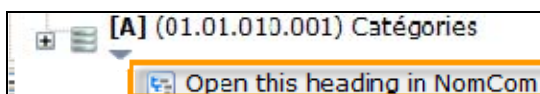
NOMCOM is the IT system enabling the Commission's filing plan and its associated files to be managed centrally. So that they are aware of the existence of all the headings of the filing plan, all Commission users will automatically have Heading Reader access to all the headings of the filing plan.

6.2. Opening an item directly in NomCom

Filing plan can be consulted from Ares ('read' mode). Headings, files and sub-files creation and modification are done from NomCom. However, you have the possibility to open a particular heading or file in NomCom. The concerned item will then automatically be located in NomCom tree view and it gives you the possibility to perform any necessary operations on it (if you have the requisite rights). If this is not the case, the options in the dropdown list next to the ▼ icons are greyed out (inactive).

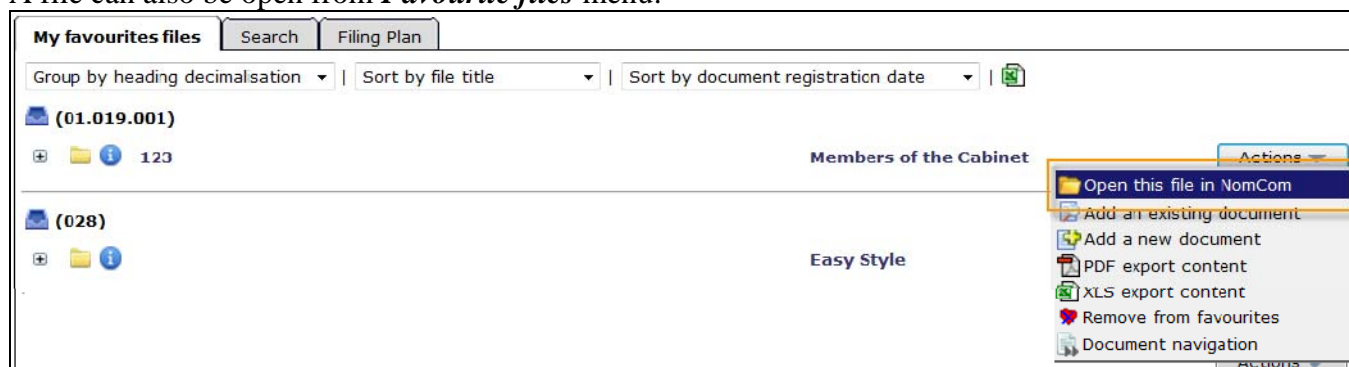
Méthode

- (1) In the navigation menu, click on ***Filing Plan*** menu
- (2) Unfold the filing plan up to the desired point.
- (3) Click ▼ icon next to the concerned element.
- (4) Click '*Open this heading in NomCom*' or '*Open this file in NomCom*':



Note

A file can also be open from *Favourite files* menu:



See also

Adding a file to your list of favourite files

Adding an existing document from the filing plan


Creating a new document in a file from the filing plan

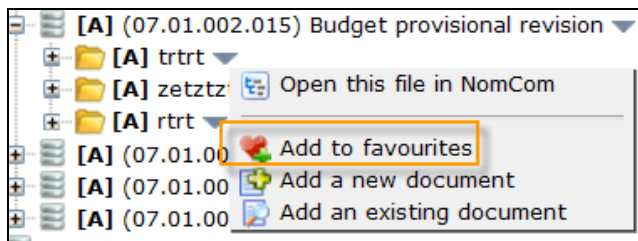
Recovering entities

6.3. Adding a file to the list of favourite files

Method

- (1) In the navigation menu, click on *Filing Plan* menu.
- (2) Expand the tree structure of the filing plan until you reach the file you wish to add in your list of favourite files.

- (3) Click  icon next to the file and press <Add to favourites> option:




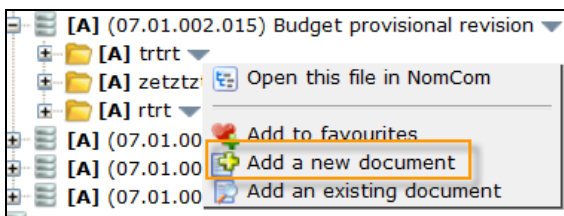
6.4. Creating a new document in a file from the filing plan

Context

How to create a new document in Ares from a file via the tree structure of the filing plan.

Method

- (1) In the navigation menu, click on **Filing Plan** menu.
- (2) Expand the tree structure of the filing plan until you reach the file from which you want to create a new document.
- (3) Place your cursor on the  icon corresponding to this file. Ares checks whether you have the required rights to perform actions in this file. Please wait a moment. The available options are displayed in black.
- (4) Select <Add a new document>:

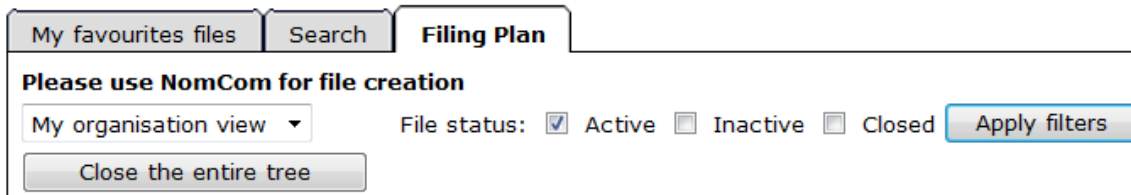


- (5) You are redirected to the 'Document' tab page to enter the metadata of your new document.
- (6) This gives you the entry screen allowing you to create a new document: see Module 2 for details about the creation of a new document.
- (7) Click on <Save> or <Register and send>

- (8) The document will automatically be filed in the file initially chosen via the filing plan. You can verify this by clicking on the 'Filing' tab in the 'Identification' area or in the filing plan in the corresponding file.

Notes

- You can select in the dropdown list to view the complete filing plan or just the part of the filing plan that corresponds to your DG. You can also filter according to the files' status: tick the status you want to display then click <Apply filters>:



The screenshot shows a web interface with three tabs: 'My favourites files', 'Search', and 'Filing Plan'. The 'Filing Plan' tab is active. Below the tabs, there is a message: 'Please use NomCom for file creation'. Under this message, there is a dropdown menu labeled 'My organisation view'. To the right of the dropdown is a 'File status' section with three checkboxes: 'Active' (checked), 'Inactive', and 'Closed'. To the right of these checkboxes is a blue button labeled 'Apply filters'. Below the 'File status' section is a button labeled 'Close the entire tree'.

- You have the option of completely closing the filing plan by clicking on <Close the entire tree>.

6.5. Adding an existing document from the filing plan

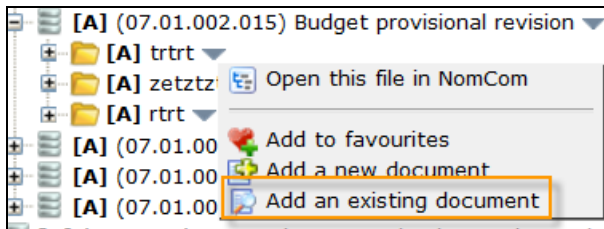
Context


How to add an existing document (document already saved or registered in Ares) from a file via the tree structure of the filing plan.

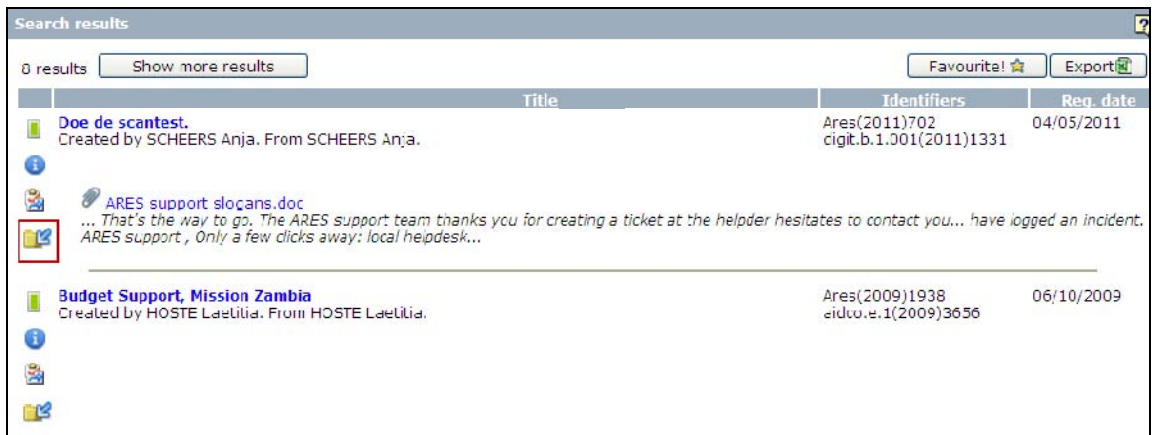
Method

- Click on **Filing Plan** in the **Files** menu.
- Expand the tree structure of the filing plan until you reach the file in which you want to place a new document.
- Place your cursor on the ▼ icon corresponding to this file. Ares checks whether you have the required rights to perform actions in this file. Please wait a moment. The available options are displayed in black.

- (4) Select <Add an existing document>.



- (5) The document search tab opens: enter the relevant search criteria and click on <Search> or press [Enter].
- (6) The list of results appears. Click on the  icon to file the document in the chosen file. Click on the hyperlink on the title of the document to view the details:



- (7) The document will automatically be filed in the selected file.

Notes

- You can use <Details> in the filing plan to view all the metadata of a document.



- <Unfile> unfiles the document from the current folder.

7. MODULE 7: FILING METHODS

7.1. Filing from favourite files

Context

The list of favourite files is important in the filing process because it allows each file manager to keep a custom list of files currently used without having to find them via the filing plan or search function every day.

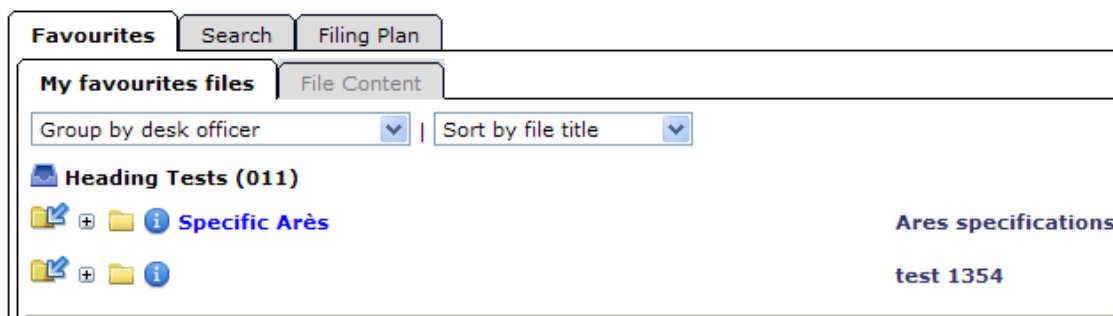
Files can be added to the favourites list either from the **Files/Favourite Files** menu or from the *Filing* tab page of a document.








You can only file in the files for which you have adequate rights.

Method




- (1) From the *Filing* tab page of the document, click on the *Favourites* tab




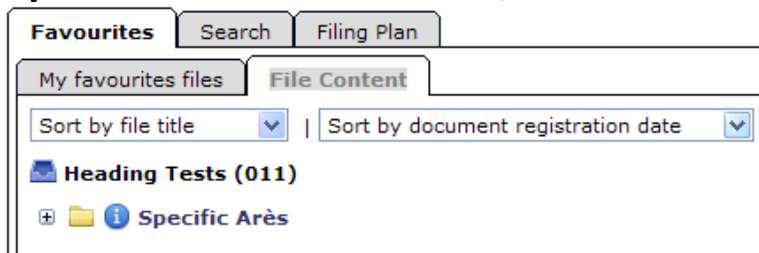
- (2) Click on the  icon allowing filing in this file.
- (3) A line corresponding to the file appears in the document. A star is now displayed on the tab 'filing' meaning that the document has been filed. The other users can now quickly see whether the document has been filed. (even if the users do not see the concerned filed).


Filed in				
2 item(s) found, displaying 1 to 2. Page(s): 1. Item(s) per page: 10 Show all				
Specific Code	File title	Chef de file		
Specific Arès	Ares specifications	digit.b.4		
AG/MAN/HRM B1 0002	B1 2008 Human Resources - statutory personnel	digit.b.1		

Note

- The icon  enables you to unfile the document from the corresponding file.
-  icon informs you, through the tooltip, who has filed the document in the folder and when.
- If the system was not able to identify the person, the  appears.

- A click on the icon  opens the file to show its sub file for example.
- If you want to see the contents of a file, click on its name: 'file content' tab opens.



- A click on  adds the corresponding file to your list of favourite files.

See also

Managing your favourite files list

Creating a new document from a favourite file


7.2. Filing from Search


Context

How to search in the list of all the existing files of your DG to which you have access and to file from one of these files.

Method

- (1) From the *Filing* tab page of the document, click on the *Search* tab:

- (2) Enter your search criteria in the relevant fields. (Your department is entered in the *Chef de file* field by default. You can change this field if required.) You may use  to launch a complete search.
- (3) Click on <Search> or press 'Enter'.




- (4) From the list of results use the  icon to select a file for the filing. You may see the contents of the file clicking on its 'File code' or 'Specific code'

Search Result




File Content

176 item(s) found, displaying 1 to 10.

Page(s): 1, 2, 3, 4, 5, 6, 7, 8, 9, 10... Item(s) per page: 10 Show all

	File code	Specific code	File title	Chef de file	Desk officer	Status	Decimalisa
	♥ 2009-AD6657		test limited	digit.b.1.001	marisab	ACTIVE	14.01.007
	♥ 2009-AD6658		test non limited	digit.b.1.001		ACTIVE	14.01.007
	♥ 2009-AD9778		Echo/test/qhhqgdqhgjqh.20002020.050210212012	digit.b.1.001		ACTIVE	14.01.007
	♥ 2009-AD9819		Voyons voir	digit.b.1.001	hallima	ACTIVE	027.010

- (4) A line corresponding to the file appears in the document. A star is now displayed on the tab 'filing' meaning that the document has been filed. The other users can now quickly see whether the document has been filed. (even if the users do not see the concerned filed).

Filed in					
1 item(s) found, displaying 1 to 1. Page(s): 1. Item(s) per page: 10 Show all					
	Specific Code	File title	Chef de file		
	AG/MAN/STAFFREL/DG 0014	Affaires générales DG 2008	digit		

Notes

- <Reset> clears the criteria and results of the previous search so that you can perform a new search.
- *DG code* (file): Code given to the file by the system (year-number sequence)
- *Decimalisation*: NOMCOM code of the heading that contains the file (e.g.: 09.01.31.001.005). On a sub-file line this code is followed by the code of the parent file (e.g.: 09.01.31.001.005.2007-AA2518)
- *Specific code*: internal code for managing files given by the DG. This code may be a copy of the codes on paper files or part of a file identification system unique to the DG.
- *Chef de file*: the department that owns the file. (By default, this field contains the name of your department, but you can change it if necessary.) The search does not take into account lower hierarchical services. For example, if you are looking for all files where 'digit.b.' is 'chef de file', the results will only display the files where CF is only 'digit.b.'. CF 'digit.b.1', 'digit.b.2', etc. will not be displayed in the results. You can see all files should you tick the adjacent box.
- *File title*: name of the file. The file title itself must be concise, pertinent and understandable (regardless of how easy to read the documents actually filed there are)

See also

Finding documents, files or tasks

Simple search

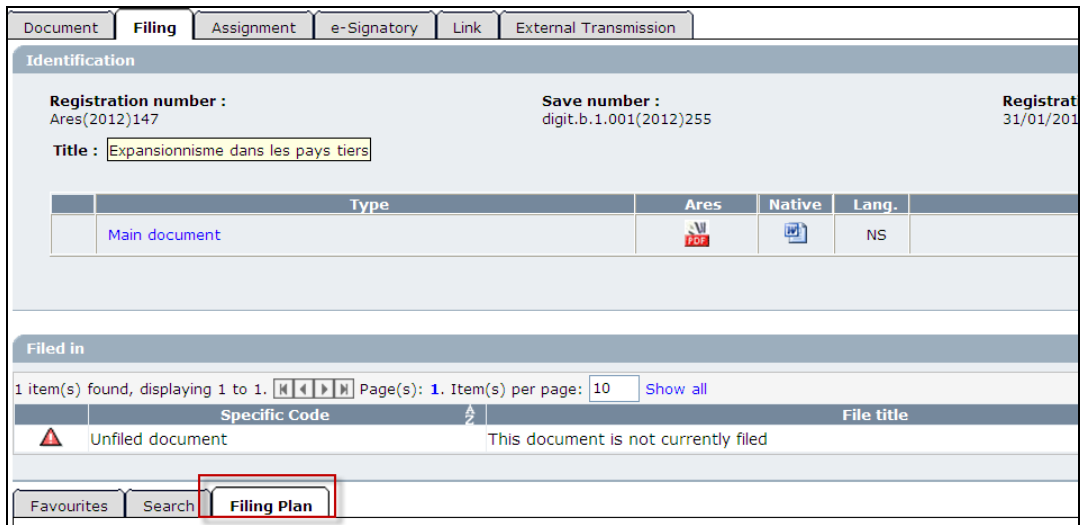
7.3. Filing from the filing plan

Context

How to search files via the navigation menu in the filing plan and file from the tree structure.

Method

- (1) From the *Filing* tab page of the document, click on the *Filing Plan* tab:



- (2) Expand the filing plan tree until you reach the level of the file or sub-file where you want to file your document.
- (3) Place your cursor on the ▼ icon corresponding to this file. Ares checks whether you have the required rights to perform actions in this file. Please wait a moment. The available options are displayed in black.
- (4) Select *File* from the drop-down list to the right of the file.

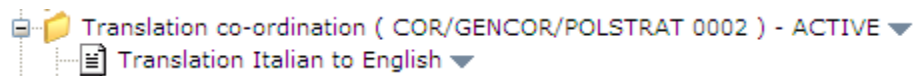


- (5) A line corresponding to the file appears in the document. A star is now displayed on the tab *filing* meaning that the document has been filed. The other users can now quickly see whether the document has been filed. (even if the users do not see the concerned filed).

Filed in				
2 item(s) found, displaying 1 to 2. Page(s): 1. Item(s) per page: 10 Show all				
	Specific Code	File title	Chef de file	
	AG/MAN/STAFFREL/DG 0014	Affaires générales DG 2008	digit	
	azu	file tests error	digit.b.4	

Note

You also see the document filing in the filing plan if you open the file :



See also

Creating a new document from the filing plan

Adding an existing document from the filing plan

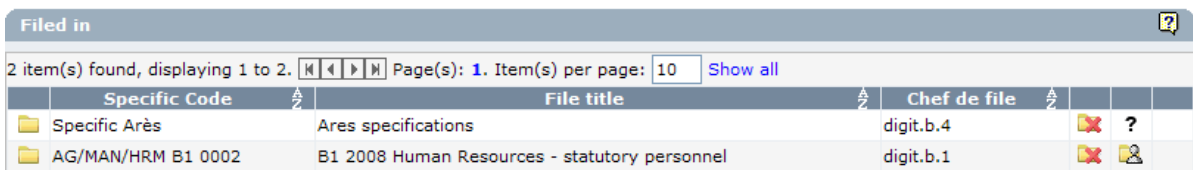
7.4. Removing a document from a file

Context

How to remove a document from the file in which it was filed.

Method

- (1) When the registered document is filed in at least 2 files,  icons appear indicating that it may be removed. Click on one of the  icons.



Specific Code	File title	Chef de file
Specific Arès	Ares specifications	digit.b.4
AG/MAN/HRM B1 0002	B1 2008 Human Resources - statutory personnel	digit.b.1

- (2) Note the disappearance of the  icon indicating that the remaining file may be removed.

See also

Filing a registered document (mandatory)

Deleting a saved document

8. MODULE 8: MANAGING ASSIGNMENTS TASKS

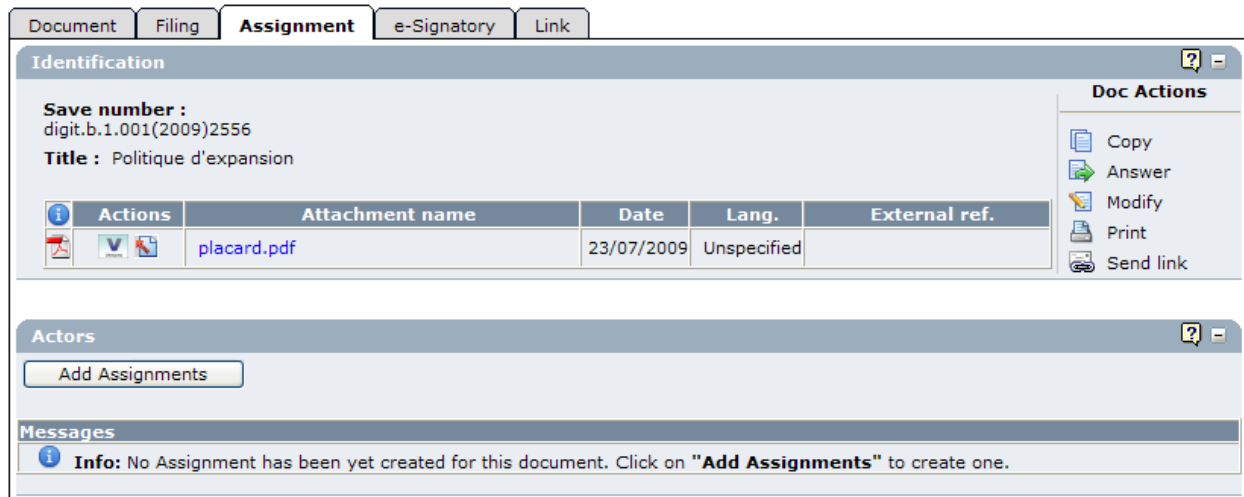
8.1. Making assignments and creating tasks


Context

An assignment shows that a task to be executed has been allocated to one or more persons. Therefore, each assignment corresponds to a task which will be processed according to the code specified. You can also specify a deadline for the task.

Method

- (1) From your document, click on the '*Assignment*' tab.
- (2) Click on the <Add Assignment> button



Actions	Attachment name	Date	Lang.	External ref.
	placard.pdf	23/07/2009	Unspecified	

Actors

Add Assignments

Messages

Info: No Assignment has been yet created for this document. Click on "Add Assignments" to create one.

A modal window²⁰ will open to let you edit the assignment

Document **Filing*** **Assignment** **e-Signatory** **Link** **External Transmission**

Identification

Registration number :
Ares(2013)203

Save number :
digit.b.1.001(2012)1938

Title : Interruption des donations du projet EIUO

Type	Ares	Nat
Main document		

Task

Finish Finish with comments Back to sender Delegate

Action code: CF

Assigned by: VEKEMANS Nicolas (DIGIT.B.1.001)

Instructions:

Actors

Add Assignments

Code

CF

INFO

-- Webpage Dialog

Save and Launch Cancel Modification

Code	Assigned to	Deadline	Re
CF	KACI Emilie (DIGIT.B.1.001)	26/11/2012	26/11/
INFO	KACI Emilie (DIGIT.B.1.001)	10/12/2012	26/11/

New tasks : **Action code** **Last Name - First Name** **Organi**

(3) Enter the information you want in the lines provided:

²⁰ In user interface design, a modal window is a child window which requires the user to interact with it before they can return to operating the parent application, thus preventing the workflow on the application main window. Modal windows are often called modal dialogs because the window is often used to display a dialog box.

-- Webpage Dialog

Save and Launch Cancel Modification Selected filter: My DG

Code	Assigned to	Deadline	Read on	Assigned by	Clos
CF	KACI Emilie (DIGIT.B.1.001)	26/11/2012	26/11/2012	VEKEMANS Nicolas	
INFO	KACI Emilie (DIGIT.B.1.001)	10/12/2012	26/11/2012	VEKEMANS Nicolas	

New tasks :

Action code	Last Name	First Name	Organisation / Service	Deadline	Critical
ASOC	RAEYMAEKERS	Ralph	DIGIT.B.1.001		No

Instructions

Workflow template:

Save and Launch Cancel Modification Insert the list See list

- Select the relevant *Action code* from the dropdown list. (For an explanation of the various action codes, see [Definition of action codes](#))
- In the *Last Name First Name* field, add the names of the persons to receive a task. You can do this in one of three ways: either by selecting a *Workflow template* (distribution list), by using the *Search* function (🔍), or by entering the first three characters of the name manually and allowing the full text search to display an alphabetical list of the first ten names corresponding to the characters you entered. From this list, select the name you want and the *Organisation/Service* field will be filled automatically.
- A *deadline* may be inserted (optional). You can either type it in manually (DD/MM/YYYY) or click on the calendar icon 📅 to access a pop-up interactive calendar. The system can also automatically calculate the deadline, in working days: type the necessary working days and click <Calculate>:

New tasks :

Action code	Last Name - First Name	Organisation / Service	Deadline	Critical
CF	VEKEMANS Nicolas	DIGIT.B.1.001	10 Calculate	No

Instructions

The date is then inserted automatically in the '*deadline*' field:


New tasks :

Action code	Last Name - First Name	Organisation / Service	Deadline	Critical
CF	VEKEMANS Nicolas	DIGIT.B.1.001	19/02/2010 10 Calculate	No

- (d) If relevant, specify that the assignment is critical by changing the value of the **Critical** droplist.
- (e) If you wish to enter instructions for the assignee, you can do so in the *Instructions* field.

The screenshot shows a form with the following fields: 'Action code' (dropdown), 'Last Name - First Name' (text input), 'Organisation / Service' (text input), 'Deadline' (calendar icon), 'Critical' (dropdown with 'No' selected), and 'Instructions' (text area). There are also small icons for each field to toggle visibility.

(If you wish to hide this field, click the  icon.)



- (4) To insert further assignment lines, use the new line that has been added automatically.
- (5) When you have entered the assignment data, confirm by clicking on <Save and Launch>.  You must have entered the assignment data correctly, otherwise the <Save and Launch> pushbutton will be greyed out.
- (6) You receive a confirmation of the launching of the tasks:



The tasks have now been generated and confirmed.


Code	Assigned to	Deadline	Assigned by	Status
CF	GARCIA MORAN Francisco (DIGIT)		KACI Emilie	Launched since 01/02/2012

The assignments will appear in the **Tasks** menu of the persons to whom they have been assigned.


If a task contains comments or instructions,  icon is automatically opened in order you can read them directly. (If there are no comments or instructions, the field is shut). Information are displayed under  icon.

- (7) Go to the *Assignments* tab page and you will see that the relevant assignments have been added.


Notes


-  A filter is available at the bottom right of the screen: you can thus see either all the assignments, the assignments of your DG or the assignments of you unit:


Code	Assigned to	Deadline	Assigned by	Status
CF	GARCIA MORAN Francisco (DIGIT)		KACI Emilie	Launched since 01/02/2012

 Take care! This very same filter is also applied when you click on 'add assignments'. Don't forget to modify it if needed.

- If you click on <calculate> and you have not introduced a number, the deadline is set by default on 10 working days.
- If you have not yet saved the assignments, you can cancel any data you have entered without saving by clicking on <Cancel Assignments>.

- The  icon next to certain fields allows you to delete the value in those fields.
- You manage the distribution lists here (<Workflow template> pushbutton) in exactly the same way as you do the distribution lists for registration or save operations.

 Always give your list a clear and relevant name so that you can find and use it again easily.

- In Ares, you cannot change the order in which assignments are displayed (as was the case in Adonis); they will be displayed in the same order when the application is launched properly.
-  Once you have clicked on <Save and Launch>, you will no longer be able to modify the assignments in question. However, if you need to, you can always **add** a new assignment line. You do this by clicking on <Edit Assignments>, and then by clicking on *Add*. Enter your data as described in point (3) above. Confirm your data by clicking on <Save and Launch>. An assignment log is displayed on the 'Assignments' tab page.
- The edition of assignment may vary depending if it is saved or registered:

- Assignment on a **registered document**:

- Nobody can modify the attached files or the metadata of the documents (except the people having the '*Special Modification*' option)
- Actors can edit assignments and file the document.
- The '*file Readers*' on top of being allowed to read the document, have the possibility to file and add assignments (a saved document without assignment would only allow them to read the content)

- Assignment on a **saved document**:

- Actors can not modify the attachments nor the document (<Modify> button is not available). They can edit assignments.
- The *File Readers* can only view the document content. They can't do any operation on the document.

See also

Recovering entities

Creating and using distribution lists

Seeing what assignments do: tasks, deadlines

Definition of action codes

8.2. Seeing what assignments do: tasks, deadlines

Context

When an assignment is launched, this creates a task for execution by the designated persons. In other words, each assignment generates a task in the *My tasks* menu of each person concerned.

The various assignments pertaining to a document are shown on the *Assignment* tab page.

Method

- (1) To see the tasks assigned to you, go to your *My tasks* menu, and then click *All My Tasks* or *All my Assignments*:

	Code	Proc.	Title	From	Received on	Deadline	Save Number	Registration Number
<input type="checkbox"/>	CLASS		[NOTIS ACC] Ares, New Document - digit.b.1.0	KAKURU RADHA Madhava (DIGIT.B.1.001)	05/03/2012		digit.b.1.001(2012)409	
<input type="checkbox"/>	CF	Cdp\ Note 3	cdp note test 03	VEKEMANS Nicolas (DIGIT.B.1.001)	08/02/2012	10/10/2011	sg.dsg1.b.2(2011)2092	
<input type="checkbox"/>	CLASS		Mail embedded	FIORE Giovanni (DIGIT.B.1.001)	07/09/2011		digit.b.1.001(2011)1999	Ares(2011)1037
<input type="checkbox"/>	CLASS		this is a test : you will like it ... I hope	WILLAIN Jean-Christophe (DIGIT.B.1.001)	19/08/2011		digit.b.1.001(2011)1957	Ares(2011)985
<input type="checkbox"/>	CLASS		Test areslook presentation du 16032011	FIORE Giovanni (DIGIT.B.1)	16/03/2011		digit.b.1.dir(2011)1061	Ares(2011)549
<input type="checkbox"/>	CLASS		workflow 1.5.3.6	KAKURU RADHA Madhava (DIGIT.B.1.001)	07/10/2010		digit.b.1.001(2010)4338	Ares(2010)1992
<input type="checkbox"/>	CLASS		RE, je	KACI Emilie (DIGIT.B.1.001)	27/09/2010		digit.b.1.001(2010)3708	Ares(2010)1814

- (2) To see the various assignments of a document, click on the name of the document in question in the *Subject* column. The system opens the task at the relevant *Assignments* tab page.

Notes

- If you have a domino effect where, for example, a directorate assigns a mail to a unit and the unit assigns it to a person, it is important for the service receiving an assigned mail with a

deadline to itself specify a deadline for the service or person to which it then assigns the mail. The service will have to shorten the deadline period to take into account the time which has passed since the first assignment. Assignments like this can lead to tighter deadlines the further down the chain one goes.

- The deadline of an assignment is optional.


8.3. Deleting assignments

Context

Assignments can be **deleted** by:


- The person who has assigned the task: if the assignment was launched less than 5 days ago.
- The DMO of the person who has launched the task: at any time (if the document is not locked).

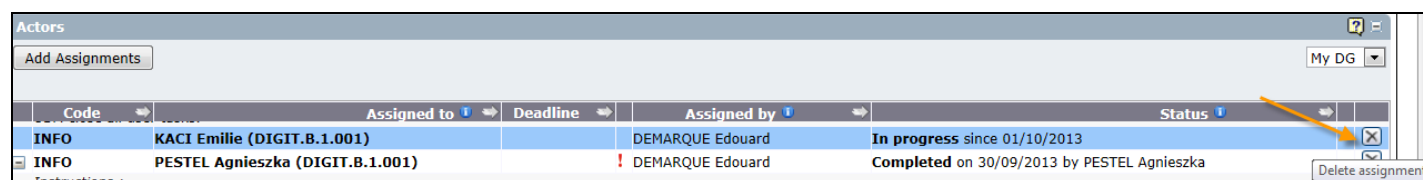
Assignments can be deleted whatever the **status** of the document is (saved or registered).

The person who has received a deleted task: the task (if not closed) appears in ~~strikethrough~~. It will always be visible in the document that an assignment has been deleted (can be seen in the assignment' tab). If that person clicks on the title of the document, she/he is automatically redirected to the home page (the access to the document is lost, except if that person has another access as file reader, stakeholder, etc....).  The only way to finish a task is to tick it and click on <finish> (the task will then completely disappear).

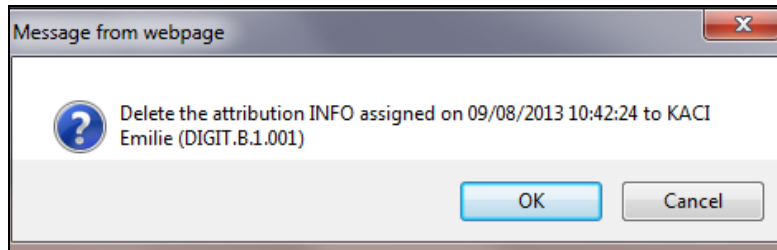
Method

To delete a launched assignment:

- (1) Open the document and click on 'Assignment'.
- (2) Click on the icon  corresponding to the assignment you would like to delete:



- (3) Click on <OK> to confirm the deletion (or <Cancel> to stop).



(4) The assignment is then greyed in strikethrough in the 'assignment' tab:

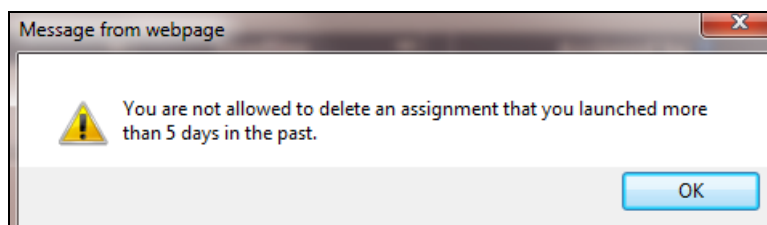
Actors				
Add Assignments				
Code	Assigned to	Deadline	Assigned by	
CF	DEMARQUE Edouard (DIGIT.B.1.001)	30/08/2013	DEMARQUE Edouard	Completed on 12/08/2013 by DEMARQUE Edouard
INFO	KACI Emilie (DIGIT.B.1.001)		DEMARQUE Edouard	In progress since 01/10/2013
Comments : Supprimé le 17/10/2013 par KACI Emilie				

And in the assignee's inbox:

All my tasks				
All my e-sign				
All my assignments				
Tasks of my roles				
Finish Follow up Clear follow up Sort by...				
	Code	Proc.	Title	Received
INFO			Liste of activities during Holidays - Ralph 03/07/2013	09/08/2013

Note

If you want to delete an assignment 5 calendar days after its launching date, please contact your DMO:



9. MODULE 9: MANAGING YOUR TASKS MENU

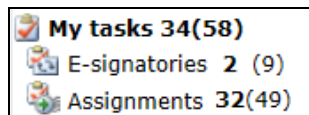
9.1. Managing your *Tasks* menu


9.1.1. Ergonomy

Context

By default, your *My tasks* menu in the main menu contains all the tasks assigned to you. In cases involving e-Signatory, tasks will not be sent to you until the preceding person has completed confirmation of their task.

The *tasks* menu has the following options:





- *My tasks*: a full list of all the tasks assigned to you.
- *E-signatories* : list of all E-signatory tasks assigned to the user.
- *Assignments* list of all Assignment tasks assigned to the user..
- The number in bold to the right of each option specifies how many **unread tasks** there are in the list in question. The number in brackets showq the total number of open tasks for the specified type.
-  The tasks meter is refreshed every 5 minutes.

Method

- (1) In your *tasks* menu click on the option to display the tasks you want to process (in our example 'assignments tasks'). A table appears showing the following information:

All my tasks All my e-sign All my assignments Tasks of my roles									
Finish Follow up Clear follow up Sort by...									
		Code	Proc.	Title	From	Received on	Deadline	Save	Number
<input type="checkbox"/>		INFO		Importation email	GRISPIGNI Marco (SG.B.2)	10/11/2010			sg.b.5(2010)29083
<input type="checkbox"/>		CLASS		NVE 09/12/08 10.05	KACI Emilie (DIGIT.B.1.001)	16/06/2009			digit.b.4(2008)2122
<input type="checkbox"/>		CLASS		ERRATUM CORRIGENDUM , SG.B.5.2009.1689 , Suite aux conclusions opérationnelles du CMB du 29.01.2009 (voir annexe), c'est la Solution 3.4 "Option B" en format RTF qu'il faut implémenter	CERRO GINÉS Jesus (DIGIT.B.1)	06/05/2009			digit.b.1(2009)987
<input type="checkbox"/>		INFO		La chasse à la Chasse	MICHELON Marco (EAC.R.6)	06/02/2009			eac.r.6(2009)357
<input type="checkbox"/>		CF		NVE 08/12/08 16:22	VEKEMANS Nicolas	08/12/2008	23/12/2008		digit.b.1(2008)2115

- (a) The **unread** tasks are shown in bold. As soon as the user accesses a task, the task is considered as read and is no longer in bold.

- (b) Each task has its specific action code.
- (c) If the task is critical, an  icon will also appear beside it.
- (d) A yellow task means that the task has not been closed at the date asked by the deadline.
- (e) A tooltip () showing the main pieces of information available on the *Document* tab page for the task in question:



- (f) the person who assigned you the task;
 - (g) the save number of the document;
 - (h) the registration number of the document;
 - (i) the type of task: Assignment (Att) or E-Signatory (Esign).
- (2) Click on the relevant task and the 'Assignment' or 'E-Signatory' tab page of the corresponding document appears.
 - (3) View the assignment information and process the document accordingly. If you need to modify the document, use the 'Document' tab page; if you have to file it, use the 'Filing' tab page.
- The tab 'Tasks of my roles' shows you the list of tasks received by the virtual entities you belong to and the persons to whom you have the delegation:

All my tasks All my e-sign All my assignments Tasks of my roles										
Sort by... ▾										
	Code	Proc.	Title	From	Received on	Deadline	To	Save Number	A/E	
	RED		04mar-01	KAKURU RADHA Madhava (DIGIT.B.1.001)	03/05/2010		ve_digit.b.1	digit.b.1.001(2010) 11559	E-sign	
	INFO		sample test 1.4.5.16a	KAKURU RADHA Madhava (DIGIT.B.1.001)	03/05/2010		ve_digit.b.1	digit.b.1.001(2010) 11538	Assign	
	CLASS		RE, Reques for the configuration of Markings	JACQUEMIN Michel (OIB.1.003)	13/11/2009		ve_digit.b.1 oib.1.002(2009)	20796	Assign	
	CLASS		European Atomic Energy Community EUR 17 500 000 Floating Rate Notes due 23 Feb 2020 Series No31 Tranche No1	ve_digit.b.1 (DIGIT.B.1)	25/08/2009		ve_digit.b.1	digit.b.1(2009)10554	Assign	
	CF		test	VAN AUTREVE Dries (DIGIT.B.1)	27/05/2009		ve_digit.b.1	digit.b.1(2009)6610	Assign	
	INFO		test wf list	ve_digit.b.1 (DIGIT.B.1)	05/03/2009		ve_digit.b.1	digit.b.1(2009)916	Assign	



You cannot open the tasks from that screen. If you want to see the details of a task, or do any action on the task (close, etc.) you have to click on 'change role' button and log as the concerned person or virtual entity.

9.1.2. Sorting received tasks

It is possible to sort received tasks by clicking on the column headers or sorting via 'Sort by' drop down menu.

Context

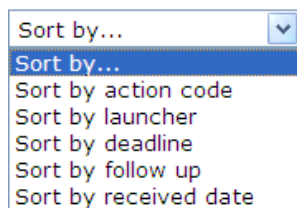
Allow the user to sort the list of received tasks by various criteria

Method


In the list of tasks, click the column header to sort in ascending order according to this criterion. If you click a second time on the column, results are sorted in descending order. The sort options are:

- Action Code
- Procedure
- Subject
- From
- Deadline
- Save Number
- Registration Number
- Type (E-sig/Att)

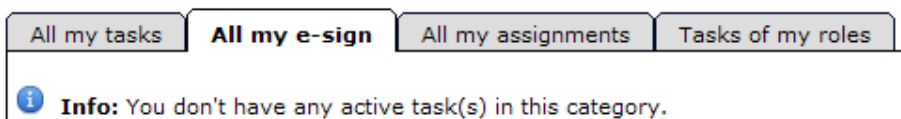
Or select in the drop-down menu the kind of sort you want:





Notes

-  You can also perform actions on a task without going through the **Tasks** menu. Instead, simply search for the document you want to process and then click the *Title* hyperlink to display details. If tasks have been assigned to you within this document, the relevant pushbuttons will be available on the '*Assignment*' tab page.

- An informative message is displayed should you have no task in your tasks menu:



-  Information is automatically updated when you perform an action on a task: the date on which the task was read (or opened) and the date on which it was closed are written by the system.

	Code	Assigned to	⇒	Deadline	Read on	Assigned by	Closed on	Closed by
	CF	KACI Emilie (DIGIT.B.1)			23/07/2009	HALLIN Mattias	23/07/2009	KACI Emilie

9.1.3. Task Follow up

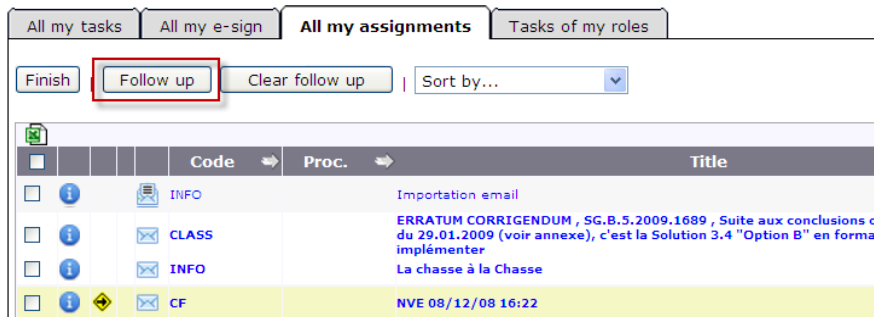
It is possible to put a flag of Follow-up on some tasks

Context:

Allowing the user to follow-up some tasks.

Method

- (1) In the tasks list, check the list(s) you want to follow-up



(2) Click on the button <Follow up>: a flag will appear next to the task

Note

To remove the flag, select the box and click on <Clear Follow up>.

See also

Filing from favourite files

Filing from search for existing files

Filing from the filing plan

Sending a task back to the person who assigned it

Entering e-Signatory data

9.2. Sending a task back to the person who assigned it

Context

If an error has occurred, it is possible to return any assignment to the person who sent it. Please use <Back to sender> function to do this.

Method

- (1) Open the document assigned to you, and go to the 'Assignment' tab page.

- (2) Click on < Back to sender> for the relevant task.
- (3) In the 'Comments' field, you can type in the reason for returning the assignment. You can also type there some instructions then confirm your data by clicking on <Back to sender> again.


- (4) You receive a message confirming the operation:



- (5) The corresponding task is sent back to the original assigner. An additional assignment line appears in the actors zone. The original assigner receive a task with the same action code with 'returned' status.

Actors					
Add Assignments					
	Assigned to	Deadline	Assigned by	Status	
INFO	VEKEMANS Nicolas (DIGIT.B.1.001)		SCHEERS Anja	Returned on 02/02/2012 by VEKEMANS Nicolas	X
INFO	SCHEERS Anja (DIGIT.B.1.001)		VEKEMANS Nicolas	Launched since 02/02/2012	X
INFO	DEBLIRE Philippe (DIGIT.B.1.001)	23/09/2011	DEBLIRE Philippe	In progress since 09/09/2011	X

Notes

- If a task contains comments or instructions,  icon is automatically opened in order you can read them directly. (If there are no comments or instructions, the field is shut).
- At the bottom of the screen you will see any other persons to whom tasks have been assigned to. Your line will be highlighted in blue:

Actors				
Add Assignments				My DG
Code	Assigned to	Deadline	Assigned by	Status
CLASS	KACI Emilie (DIGIT.B.1.001)		KACI Emilie	In progress since 12/03/2010
CF	WILLAIN Jean-Christophe (DIGIT.B.1.001)		KACI Emilie	Completed on 02/07/2010 by WILLAIN Jean-Christophe

- You can add new assignment lines by clicking on <Add Assignments>. Enter the recipients and then send the tasks by clicking on <Save and Launch>.

See also

Recovering entities

Entering assignments and creating tasks

9.3. Delegating a task

Context

Currently, a registration can involve multi assignments (such as a Directorate assigning to a Unit which, in turn, assigns to a person).

In Ares, assignments like this are created by means of a task delegation function.

Method

- (1) Open the document assigned to you, and go to the 'Assignment' tab page.

The screenshot shows the 'Assignment' tab selected among others like 'Document', 'Filing', 'e-Signatory', 'Link', and 'External Transmission'. The 'Identification' section contains fields for 'Registration number' (Ares(2010)1760), 'Save number' (digit.b.1.001(2010)3515), and 'Title' (Contracts SocieteX and CE). Below this is a table with columns 'Type', 'Ares', and an icon column. The table has two rows: 'Cover note' and 'Annex', both with PDF icons. The 'Task' section at the bottom has buttons for 'Finish', 'Finish with comments', 'Back to sender', and 'Delegate'. It also displays 'Action code: INFO', 'Assigned by: LESTIDEAU Caroline (DIGIT.B.1.001)', and 'Instructions:'.

Type	Ares	
Cover note		
Annex		

- (2) Click on <Delegate> for the task you wish to assign by delegation.
- (3) Enter the name of the person to whom the task is to be delegated (you can either type in part of the name and use the auto-complete tool or conduct a proper search by clicking on the icon).

The 'Delegate' dialog box has a 'Delegate to:' field with a search icon and a close button. Below it is a 'Comments/Instructions:' text area. At the bottom are 'Delegate' and 'Cancel' buttons.

- (4) You can type 'Comments' or instructions'.
- (5) Click <Delegate>.
- (6) A message confirms the delegation:




- (7) A new assignment line appears for the delegated person and a task appears in that person's *tasks* menu. The *Instructions* can be seen as well:

Actors				
Add Assignments		My DG		
Code	Assigned to	Deadline	Assigned by	Status
CLASS	KACI Emilie (DIGIT.B.1.001)		KACI Emilie	In progress since 07/02/2011
INFO	DELHAUWE Gregory (DIGIT.B.1.001)		LESTIDEAU Caroline	Delegated on 02/02/2012 by DELHAUWE Gregory
INFO	RAEYMAEKERS Ralph (DIGIT.B.1.001)		DELHAUWE Gregory	Launched since 02/02/2012
INFO	DEMARQUE Edouard (DIGIT.B.1.001)		LESTIDEAU Caroline	Launched since 23/01/2012

The delegated task will appear in your *Tasks* menu as 'delegated'.

Notes

- If you have a domino effect where, for example, a directorate assigns a mail to a unit and the unit assigns it to a person, it is important for the service receiving an assigned mail with a deadline to itself specify a deadline for the service or person to which it then assigns the mail. The service will have to shorten the deadline period to take into account the time which has passed since the first assignment. Assignments like this can lead to tighter deadlines the further down the chain one goes.
-  The delegation triggered by the <Delegate> pushbutton will be a manual one and apply only to the corresponding task. If you want to automatically delegate a batch of tasks for a specific action code, you have to use the <Preferences> pushbutton.

See also

Recovering entities

Preferences

9.4. Finishing a task

9.4.1. Through the Received Task box

Context

Finishing a task means closing an assignment (i.e. denoting in Ares that a task has been completed). It is possible to close one or more tasks directly from the *Tasks* box without opening them. This had been foreseen in particular for the INFO tasks who are not requiring a follow up.

Method:

- (1) Select the task you want to close

All my tasks All my e-sign All my assignments Tasks of my roles									
<div> <div>Finish</div> <div>Follow up</div> <div>Clear follow up</div> <div>Sort by...</div> </div>									
		Code	Proc.	Title	From	Received on	Deadline	Save Number	A/E
<input checked="" type="checkbox"/>		INFO		Importation email	GRISPIGNIT Marco (SG.B.2)	10/11/2010		sg.b.5(2010)29083	Assign
<input checked="" type="checkbox"/>		CLASS		test do not file AIDCO	KACI Emilie (DIGIT.B.1.001)	27/01/2010		digit.b.1.001(2010)1922	Assign
<input type="checkbox"/>		INFO		test delete file where you are not the owner	KAKURU RADHA Madhava (DIGIT.B.1)	15/05/2009		digit.b.1(2009)5893	Assign
<input type="checkbox"/>		CLASS		ERRATUM CORRIGENDUM , SG.B.5.2009.1689 , Suite aux conclusions opérationnelles du CMB du 29.01.2009 (voir annexe), c'est la Solution 3.4 "Option B" en format RTF qu'il faut implémenter	CERRO GINES Jesus (DIGIT.B.1)	06/05/2009		digit.b.1(2009)987	Assign

- (2) Click on the button <Finish>. The Task will be closed and will disappear from your Task list.

9.4.2. Through Task Details

Context

Finishing a task means closing an assignment (i.e. denoting in Ares that a task has been completed).

Method:

- (1) Open the document assigned to you, and go to the 'Assignment' tab page.

Document	Filing	Assignment	e-Signatory	Link	External Transmission
----------	--------	------------	-------------	------	-----------------------

Identification

Registration number :
Ares(2010)1760

Save number :
digit.b.1.001(2010)3515

Title : Contracts SocieteX and CE

	Type	Ares	Native	Lang.
	Cover note			NS
	Annex			NS

Task

Finish

Finish with comments

Back to sender

Delegate

Action code: INFO

Assigned by: DELHAUWE Gregory (DIGIT.B.1.001)

Instructions:

- (2) For the task you wish to close, click on:
 - (a) <Finish>: a simple click on this pushbutton finishes the task automatically
 - (b) <Finish with comments>: type in your comments and confirm your data by clicking on <Finish> again

- (3) A message confirms the closure of the task:



- (4) When you are taken back to the document, on the *Assignment* tab the assignment line in question has been closed. Today's date is automatically inserted as the closure day:

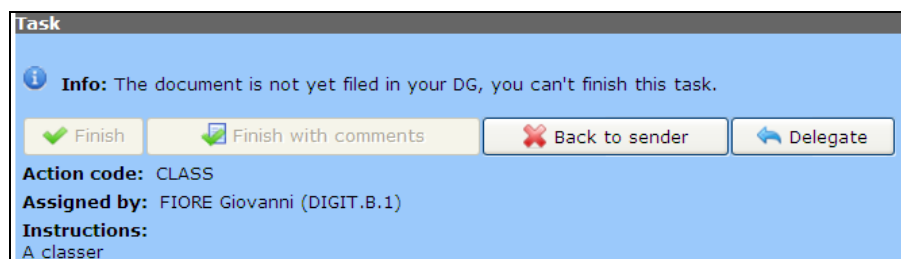
Actors				
Add Assignments			My DG	
Code	Assigned to	Deadline	Assigned by	Status
CLASS	KACI Emilie (DIGIT.B.1.001)		KACI Emilie	In progress since 07/02/2011
INFO	RAEYMAEKERS Ralph (DIGIT.B.1.001)		DELHAUWE Gregory	Completed on 02/02/2012 by RAEYMAEKERS Ralph
INFO	DEMARQUE Edouard (DIGIT.B.1.001)		LESTIDEAU Caroline	Launched since 23/01/2012

9.4.3. Specific case: finish a filing task

Context

When you want to close a filing task (on a registered or a saved document), Ares will perform a check prior to the closure of the task: i.e. there is a direct link between the actual filing of the document in my DG and the closure of the filing task (CLASS task).

Thus, if a document is not filed in my DG, it is not possible to close the corresponding filing task: the <finish> and <finish with comments> buttons are then greyed:



If the document is filed in another DG and is not filed in your DG, it will be not possible to close the filing task as long as the document is not filed in your DG.

If the document is filed, the task can be closed. There are 2 scenarios:

- If the document was filed by a user who received the filing task: the task will be closed automatically by the system (see example below in 'Method')
- If the document was filed by another user in a file of your DG: you will then have to manually close the task (as you close any other type of task).

Method

- (1) To close automatically a task: open the filing task. You are redirected to the tab '*filing*':

Document **Filing** Assignment e-Signatory Link External Transmission

Identification

Registration number : Ares(2011)188 Save number : digit.b.1.dir(2011)474 Registré : 07/02/2012

Title :

	Type	Ares	Native	Lang.	
	Cover note			NS	
	Annex			NS	

Filed in

1 item(s) found, displaying 1 to 1. Page(s): 1. Item(s) per page: 10 [Show all](#)

	Specific Code	File title
	Unfiled document	This document is not currently filed

(2) File the document

Filed in

1 item(s) found, displaying 1 to 1. Page(s): 1. Item(s) per page: 10 [Show all](#)

	Specific Code	File title	Chef de file	
	IT/IS/DECMASYS/EGREFFE//PROJFIL	e-Greffe: Suivi de projet	digit.b.1	

(3) Then if you go on the 'Assignment' tab, you may notice that the task has been closed automatically:

Actors

[Add Assignments](#)

	Code	Assigned to	Deadline	Assigned by	Status
<input checked="" type="checkbox"/>	CLASS	RAEYMAEKERS Ralph (DIGIT.B.1.001)		FIORE Giovanni	Completed on 02/02/2012 by RAEYMAEKERS Ralph
	Instructions : A classer Comments : Automatically closed on 02/02/2012 by RAEYMAEKERS Ralph (raeymrh) after filing into 2008-AA2638.				

You can see the automatic closure date, the name and Ecas login of the person who closed the task and the filing code where the document is filed.

Notes

- From **My tasks**, the user can no longer directly close a filing task if the document is not filed in a file of his DG.:

Info: Some selected CLASS task(s) cannot be finished because the related document is not filed in your DG.

- The check is done on the DG that is '*chef de file*' for the file. If you file in a folder that is shared among several DGs and the '*chef de file*' is not yours, the task will not be closed.
- If there are several CLASS tasks for people belonging to the same DG, the automatic closure will only be done for the concerned task. The other tasks must be closed automatically.
- If the document is already filed in a file of your DG, it is still possible to file the document in another file of your DG. Then your task will be also automatically closed.
- '*Not to be filed*' operation is equivalent to a filing.

- The document may be filed in a file you do not have access to (a star is displayed on the *'filing'* tab).

See also

Filing a registered document (mandatory).

10. MODULE 10: OUTBOX

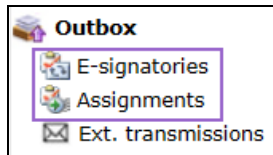
Context

The **Outbox** lists all tasks sent to other people or virtual entities so you can do the follow up. You can also consult your 30 most recent transmissions (E-mails sent and registered through Areslook will also be displayed).

Method

- For the tasks sent:

- (1) Click on '*E-signatory*' or '*Assignment*' under '*Outbox*' menu.



- (2) Ares displays the tasks you have sent:

My tasks sent for E-sign

My tasks sent for Assignment

Collapse all

Expand all

Title : RE, enregistrement bail

EXP

RAEYMAEKERS Ralph (DIGIT.B.1.001)

Assigned to

Save number: digit.b.1.001(2013)964

Assigned by

Reg. number:

Read on

Closed on

Closed by

KACI Emilie (DIGIT.B.1.001)

02/08/2013

Title : RE, relecture slides workshop

EXP

RAEYMAEKERS Ralph (DIGIT.B.1.001)

Assigned to

Save number: digit.b.1.001(2013)966

Assigned by

Reg. number:

Read on

Closed on

Closed by

KACI Emilie (DIGIT.B.1.001)

02/08/2013

Title : Implémentation règles de bonne conduite

RED

KACI Emilie (DIGIT.B.1.001)

Assigned to

Save number: digit.b.1.001(2013)762

Assigned by

Reg. number:

Read on

Closed on

Closed by

KACI Emilie (DIGIT.B.1.001)

18/07/2013

VISA

WILLAIN Jean-Christophe (DIGIT.B.1.001)

Assigned to

Save number: digit.b.1.001(2013)762

Assigned by

Reg. number:

Read on

Closed on

Closed by

KACI Emilie (DIGIT.B.1.001)

18/07/2013

KACI Emilie (DIGIT.B.1.001)

VISA

SANDU Leontina (DIGIT.B.1.001)

Assigned to

Save number: digit.b.1.001(2013)762

Assigned by

Reg. number:

Read on

Closed on

Closed by

KACI Emilie (DIGIT.B.1.001)

EXP

RAEYMAEKERS Ralph (DIGIT.B.1.001)

Assigned to

Save number: digit.b.1.001(2013)762

Assigned by

Reg. number:

Read on

Closed on

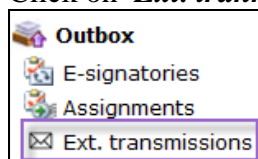
Closed by

KACI Emilie (DIGIT.B.1.001)

- (3) All tasks related to a single document are grouped. You can access the Document details by clicking on the hyperlink on the Subject, the symbols or allow you to expand or close the document's assigned tasks.(E-signatory or Assignments).

- For the external transmissions:

- (1) Click on '*Ext. transmissions*' under '*Outbox*' menu:



(2) Several information are displayed:

My recent transmissions

Tick to see only failed transmissions

Display only failed external transmissions

Excel export

Status of the transmission: error, sent, queued, cancelled

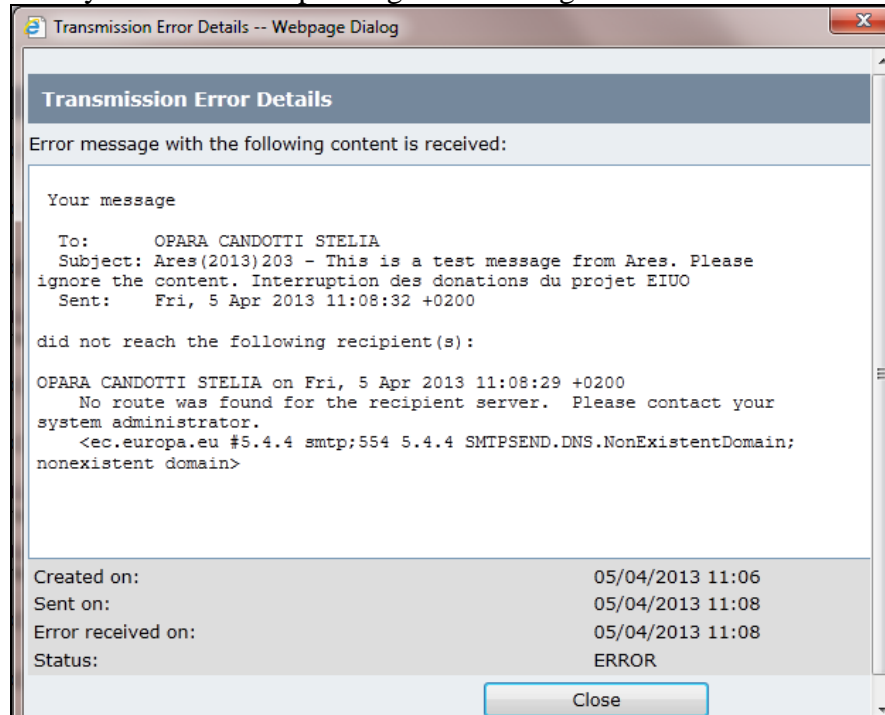
	Document title	Registration number	Transmitted by	External recipient(s)	Ext. transm. date	Status
	Interruption des donations du projet EIUO	Ares(2013)203	KACI Emilie (DIGIT.B.1.001)	OPARA STELIA	05/04/2013	ERROR
	les pays tiers	012)147	KACI Emilie (DIGIT.D.1.001)	PODOGI		SENT
	currier concer	12)109	KACI Emilie (DIGIT.B.1.001)	EBEID		SENT

Tooltip with document details

Click to open the document

Click to display failed transmission details

(3) You are also informed about the outcome of your transmissions. If failed, a hyperlink leads you to the corresponding error message. Click on 'ERROR' to see it:



Notes

- When all the tasks related to the same document are finished, the document will disappear from the **Outbox**.
- The symbol indicates that the task still open and past its deadline.
- You can collapse or expand all documents.

11. MODULE 11: RECEIVED DOCUMENTS

11.1. See the Received Documents

Context

You can view all the documents you have received in Ares, i.e. a list of all registered documents where you are specified as a recipient (this can be either the main 'To' recipient or a 'cc' recipient).

The number of non open documents appears next to **'Received Docs'** in bold. The total number of received documents appears between brackets. A star is displayed in the tabs *Received documents/ Documents for my roles/ Documents for Administrative Entity* when at least one document is unread (still in bold)



The meter for received documents is refreshed every 5 minutes.

Two other tabs are available *'Document for my roles'* and *'Document for administrative entity'*.

- *'Document for my roles'*: documents received by the people from whom you have the delegation and documents received by the virtual entity you belong to.



It is not possible to open from that tab those documents. You have to use <change role> function to log on as the delegation or as a virtual entity to be able to open the documents.

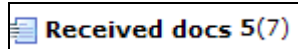
- *'Document for administrative entity'*: displays the documents sent to an administrative entity (for example to a service, a Direction, a DG,...). Please note that users with 'base' or 'user' profile do not have access to this tab. The access to those documents follow organisation chart. If the recipient service is at directorate general, directorate or unit level only staff directly attached to that service will have access, i.e. the director-general/director/head of unit and her/his secretary staff. In fact, only users belonging to a '.dir' ARES organisational group will have access. If the recipient service is at the last organisational level, the whole service will be able to access the document. For example, if a document is sent to the unit '*digit.b.1*', only the head of unit and the secretariat are able to see the document. If a document is sent to '*digit.b.1.001*', all staff belonging to that section have access to it.



Sensitive documents should not be addressed to a service, but always to individual staff members. This feature only applies to documents created from Ares 2.5 (existing documents will not be modified).

Method

- (1) In the **Documents** menu, click on **Received Docs**.



- (2) The system displays the list of documents you have received.

Received Document

Document for my roles

Document for Administrative Entity

Delete notification(s)

Follow up

Clear follow up

Mark as Read

Mark as Unread

Display...

		Title	Sent by	Save number	Reg. number	Reg. date	Created by
		Test attachment ED 21/09/2012	PESTEL Agnieszka (DIGIT.B.1.001)	digit.b.1.001 (2012)1418	Ares(2012)742	21/09/2012	demared
		tache class	FISCHER Claudia (SG.DSG1.B.2)	sg.dsg1.b.2 (2012)1276	Ares(2012)665	03/08/2012	fischci
		HAN Release 2.3	ve_sg.sg han (SG)	digit.b.1.001 (2012)1249	Ares(2012)652	27/07/2012	kakurma
		CVS to SVN	NOVAKOVIC Goran (2012)1247	digit.b.1.001 (2012)1247	Ares(2012)651	27/07/2012	kakurma

- (3) Click on the *title* to open the details of the document.

Notes

- The icon is a tooltip displaying the main information from the relevant 'Document' tab page.

HAN Release 2.3

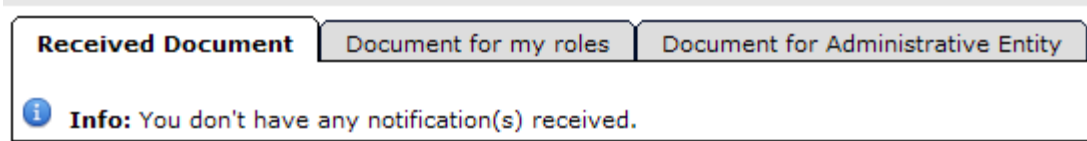
HAN Release 2.3
Creation date : 27/07/2012
Encoding Date : 27/07/2012
Registration date : 27/07/2012
Save number : digit.b.1.001(2012)1249
Registration number : Ares(2012)652
Comments :
Procedure :
Sender(s) : ve_sg.sg han (SG)
Recipient(s) : GRISPIGNI Marco (SG.DSG1.B.2), KAKURU RADHA Madhava (DIGIT.B.1.001), DEBLIRE Philippe (DIGIT.B.1.001)...
Attachment(s) : email.rtf, Outlook original email.msg

- A tooltip on the registration date gives the exact time of the registration of the document:

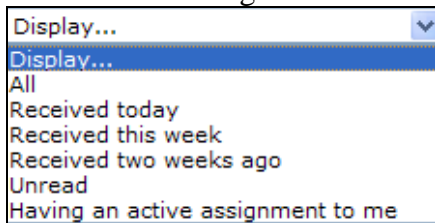
Reg. date **Created by**

03/10/2012 tanghga
 Registration time: 9:41 AM

- An informative message is displayed when you have no received documents:



- **⚠ Received Document (s) are not always related to assignments.** In this section only the field 'Recipient' of the tab document is taken into account (even if you can give an Assignment to the Recipient)
- Received documents are sorted by registration date by default. You can sort the received documents clicking on the column titles or using the drop down menu in 'Sort by':



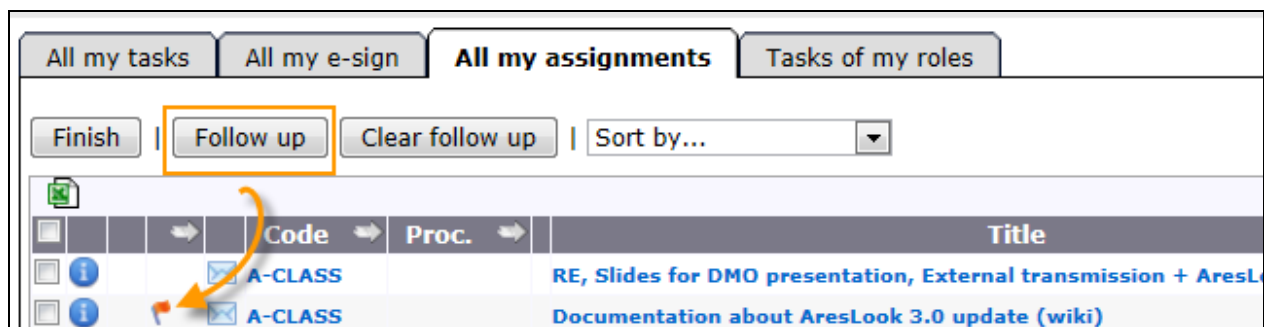
- A document highlighted in yellow means that the document has been sent by a DG different DG from yours.

11.2. Follow up of Received Documents

It is possible to follow up the documents by putting a flag.

Method

- (1) Select the document you want to follow up on
- (2) Click on the button <Follow up> and a flag will appear next to the Document:



Note

To remove the follow up of a document, select it and you click on <Clear Follow up>

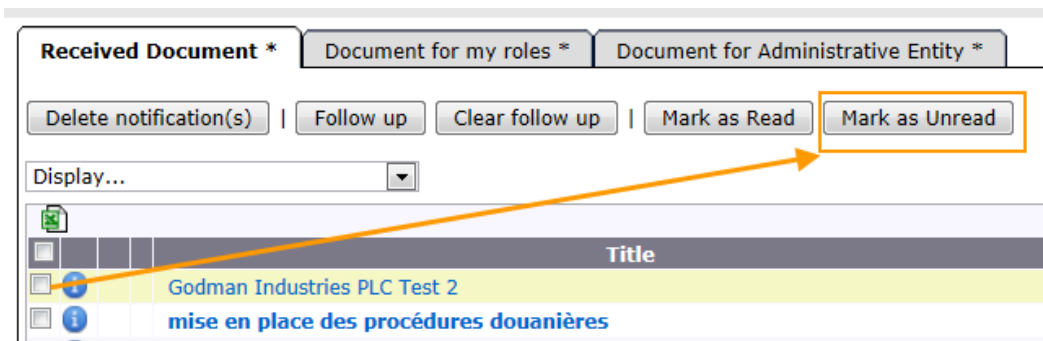
11.3. Display the document as read or unread

You can display a document as *Read* or *Unread*. An *Unread* Document will be displayed in bold with a little envelope next to it.

A document is considered "*Read*" as soon as you open its details.

Method

- (1) To display a Document as *Not Read*, check the box next to the Document(s)
- (2) Click on the button <Mark as Unread>:



or

- (1) To display an unread Document as *Read*, check the box next to the Document(s)
- (2) Click on the button <Mark as read>

11.4. Remove the notification of a Document from the received ones.

You have the possibility to remove a notification from your list of received documents.



This won't delete the Document but it will only remove it from your list. You can always access the Document if you do a search.

Method

- (1) To remove a Document from your list, check the box next to the Document(s)
- (2) Click on the button <Delete Notification(s)>.

Received Document

Document for my roles

Document for Administrative Entity

Delete notification(s)

Follow up

Clear follow up

Mark as Read

Mark as Unread

Display...

	Title	Sent by	Save number	Reg. number	Reg. date	Created by
<input type="checkbox"/>	Test attachment ED 21/09/2012	PESTEL Agnieszka (DIGIT.B.1.001)	digit.b.1.001 (2012)1418	Ares(2012)742	21/09/2012	demared
<input type="checkbox"/>	tache class	FISCHER Claudia (SG.DSG1.B.2)	sg.dsg1.b.2 (2012)1276	Ares(2012)665	03/08/2012	fischci
<input type="checkbox"/>	HAN Release 2.3	ve_sg.sg han (SG)	digit.b.1.001 (2012)1249	Ares(2012)652	27/07/2012	kakurma
<input type="checkbox"/>	CVS to SVN	NOVAKOVIC Goran (2012)1247	digit.b.1.001 (2012)1247	Ares(2012)651	27/07/2012	kakurma

Note



Every month, notifications older than 3 months are automatically deleted (read and unread).

12. MODULE 12: DEADLINE

Context

This important functionality in Ares allows you to display the tasks which are not closed and assigned to the users from your administrative entity.

For example, if you work at 'unit' level (ex: your service is 'sg.b.2'), you will see the tasks assigned to the persons at the level of your unit. If you work at 'direction' level (ex: your service is 'sg.b'), you will see the tasks assigned to the persons of your direction, i.e. whose service 'sg.b', 'sg.b.1', 'sg.b.2'...



This functionality is only available for 'Advanced Secretary', 'Advanced user' and 'CAD' profiles.

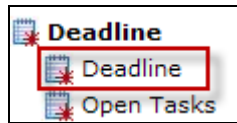


Deadline is only updated after 5 PM (that explains why some tasks' status may not be not correct).

12.1. Deadline

Method

- (1) In the menu **Deadline** select *Deadline*



- (2) The Deadline shows the tasks which are not closed assigned to a person/virtual entity of a specific unit/direction/DG and **which contain a deadline**.

Information								
The Deadline List displays all open tasks with specified deadline , assigned to a user from a certain unit / direction / DG								
Deadline list								
9 item(s) found, displaying 1 to 9. Page(s): 1 Item(s) per page: 15 Show all								
	Code	Title	Assigned to	To Service	Deadline	Assigned by	Save Number	A/E
INFO	go to document details		CERRO GINES Jesus	DIGIT.B.1.001	19/09/2009	VEKEMANS Nicolas	digit.b.1.001 (2009) 3197	Assign
CLASS	go to document details		KURAYUR EASWARAN Natarajan	DIGIT.B.1.001	19/09/2009	CERRO GINES Jesus	digit.b.1.001 (2009) 3197	Assign
CLASS	go to document details		O'CUILLEANAIN Nicholas	DIGIT.B.1.001	19/09/2009	VEKEMANS Nicolas	digit.b.1.001 (2009) 3197	Assign

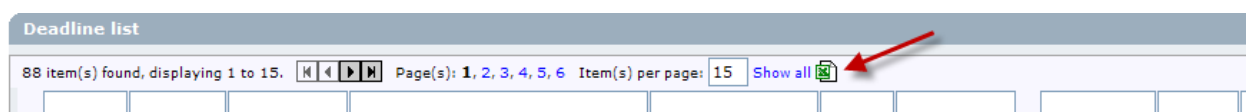
For each task you will find the following information:

- The Action Code (CF, CLASS, SIGN...)
- The title of the corresponding document

- The name of the person who has assigned the task
- The name of the person who has received the task
- An indication of the existence of a deadline: Y(Yes) meaning a deadline has been set and N (No) meaning there is no deadline.
- The deadline.
- The save and/or registration number
- The type of workflow: Att/Esig (Assignment or E-signatory).
- The unit of the person who has received the task.

Notes

- The deadline results can be exported in Excel



- If the document has a restricted visibility (ex: restricted through a marking), the title of the document will be replaced by the mention 'Go to document details'.

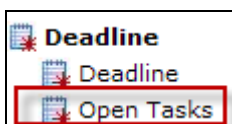
12.2. Open tasks

Content

Open tasks shows all non closed tasks of your unit /direction/ DG, with and without dealine.

Method

- (1) Click on *Open tasks* under the menu *Deadline*.



- (2) Open tasks are displayed:

Information							
This List displays all open tasks with specified deadline or not , assigned to a user from a certain unit / direction / DG							
Open Tasks							
54 item(s) found, displaying 1 to 15. Page(s): 1, 2, 3, 4 Item(s) per page: 15 Show all							
Code	Title	Assigned to	To Service	Deadline	Assigned by	Save Number	A/E
INFO	go to document details	CERRO GINES Jesus	DIGIT.B.1.001	19/09/2009	VEKEMANS Nicolas	digit.b.1.001 (2009) 3197	Assign
CLASS	go to document details	KURAYUR EASWARAN Natarajan	DIGIT.B.1.001	19/09/2009	CERRO GINES Jesus	digit.b.1.001 (2009) 3197	Assign
CLASS	go to document details	O'UILLEAININ Nicholas	DIGIT.B.1.001	19/09/2009	VEKEMANS Nicolas	digit.b.1.001 (2009) 3197	Assign

For each task you will find the following information:

- The Action Code (CF, CLASS, SIGN...)
- The title of the corresponding document
- The name of the person who has assigned the task
- The name of the person who has received the task
- An indication of the existence of a deadline: Y(Yes) meaning a deadline has been set and N (No) meaning there is no deadline.
- The save and/or registration number
- The type of workflow: Att/Esign (Assignment or E-signatory).
- The unit of the person who has received the task

Note

Results may be exported in Excel:

Open Tasks							
564 item(s) found, displaying 1 to 15. Page(s): 1, 2, 3, 4, 5, 6, 7, 8, 9, 10... Item(s) per page: 15 Show all							

13. MODULE 13: MANAGING E-SIGNATORY

Context

e-Signatory is a workflow functionality enabling you to have an original document created/modified/adopted by a chain of persons.

13.1. Entering e-Signatory data

This functionality enables you to generate a list of persons involved in the process of drawing up, validating and sending a document. Each person on the list is given a specific task (represented by an action code) and a deadline for performing that task.



The workflow for processing tasks is a sequential one. A task cannot be processed in a person's **Tasks** menu until the preceding person in the workflow has closed their task.

Method


- (1) Go to the *e-Signatory* tab page.
- (2) Click on <Create E-Signatory>.

The screenshot shows the e-Signatory interface with the following elements:

- Navigation tabs:** Document, Filing, Assignment, **e-Signatory**, Link.
- Identification section:**
 - Save number:** digit.b.1.001(2012)258
 - Title:** Expansionnisme dans les pays tiers
 - Table:**

Type	Actions	Native	Lang.	External ref.	Version
Main document			NS		
- Doc Actions (Right Panel):**
 - Copy
 - Answer
 - Modify
 - Print
 - Send link
 - Add translation
 - Manage procedure
- Actors section:**
 - Create e-Signatory** (button, highlighted with a red box)
- Messages:**
 - Info:** No e-Signatory has been yet created for this document. Click on "Create e-Signatory" to create one.

(3) A modal window²¹ will open to let you complete the relevant e-signatory actors:

- (a) Select the relevant action code from the drop down list
- (b) In the *Last Name - First Name* fields, enter the names of the persons who are to receive a task. When you go to specify e-Signatory 'actors', you can select a *Workflow template* (distribution list), do a search , or type in the first few characters of the name and the full text search will show a list of names that potentially correspond to your entry. From this list, select the name you want and the *Organisation/Service* field will be filled automatically
- (c) If needed or add a new e-Signatory manager²². You can have several e-signatory managers (with equal rights):

This function allows the manager to:





- **modify** the E-Signatory throughout the workflow (only on the undertaken tasks)
- **add** a new task on a saved document even if the last task of the e-signatory had already been finished.²³
- perform a **Bypass** on the E-Signatory.

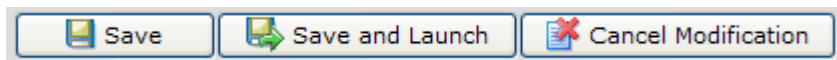
²¹ In user interface design, a modal window is a child window which requires the user to interact with it before they can return to operating the parent application, thus preventing the workflow on the application main window. Modal windows are often called modal dialogs because the window is often used to display a dialog box.

²² This person will have the right to edit the e-Signatory and to use the 'bypass' action

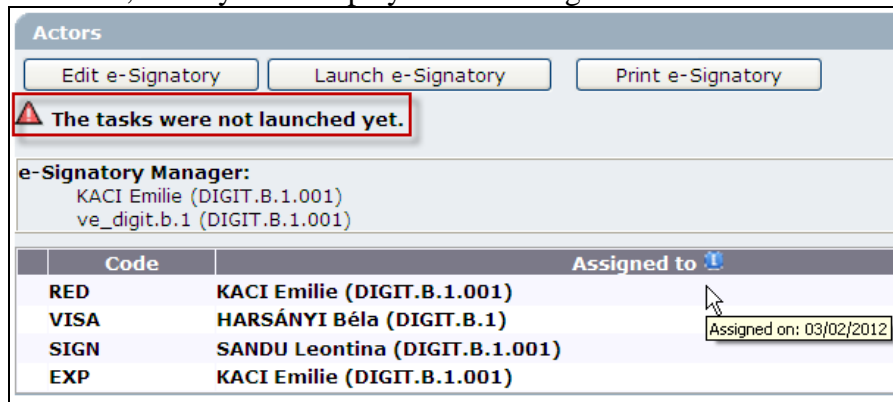
²³ This action can also be performed by the creator of the document.

When creating an E-Signatory, the manager will be initialized by default as the person creating the E-Signatory. However, it is possible to select another user as manager or have another person or virtual entity.

- (d) A *Deadline* may be added to the action code but it is optional. If no deadline has been proposed you can always specify one.
You can either type it in manually (DD/MM/YYYY) or click on the calendar icon  to access a pop-up interactive calendar.
- (e) If relevant, specify that the assignment is critical by ticking the  checkbox.
- (f) If you wish to enter instructions for the assignee, you can do so in the *Instructions* field. (To hide this field, click on the  icon.)
- (4) The order in which the assignments are sent will, by default, be identical to the order they appear on-screen. If you wish to change it, use the  button to move tasks up/down a level (via drag and drop).
- (5) To validate the information encoded in creating/editing an E-Signatory, the following actions are available:



- <Save>: the system makes a backup of the E-Signatory without launching the tasks. In this case, the system displays the message 'The tasks have not yet been launched':



- <Save and Launch>: The system combines a backup of the E-Signatory and launches the tasks.
- <Cancel modification> : redirects the user to the previous state.

It is now possible with the button <Save> to safeguard the information encoded directly without launching the workflow of the E-Signatory.



You must have entered the assignment data correctly, otherwise the <Save E-Signatory> pushbutton will be greyed out.



- (6) The tasks will appear in the **Tasks** menu of the persons to whom they have been assigned in the order you selected.
- (7) Go to the '*e-Signatory*' tab page and check that the relevant assignment lines have been added, that they have the relevant action code and the order in which they appear (sequential number) is correct.

Code	Assigned to	Deadline	Assigned by	Closed on	Status
RED	KACI Emilie (DIGIT.B.1.001)		KACI Emilie		Launched since 03/02/2012
VISA	HARSÁNYI Béla (DIGIT.B.1)		KACI Emilie		
SIGN	SANDU Leontina (DIGIT.B.1.001)		KACI Emilie		
EXP	KACI Emilie (DIGIT.B.1.001)		KACI Emilie		

Notes

- A warning is displayed when a user tries to register a document whose e-signatory has not been launched. It then prevents registration of documents with no proper signatory.

- If you wish to delete an actor from the workflow, click on the icon.
- If a multi-tiered task is involved, it is important for the service receiving a task with a deadline to itself specify a deadline for the service (or person) to which it then assigns the mail. The service will have to shorten the deadline period to take into account the time which has passed since the first assignment. Assignments like this can lead to tighter deadlines the further down the chain one goes.
- In an e-Signatory chain of tasks, the person currently performing their task has write access to the document and version access to the file and will have the right to edit the e-Signatory. The person can add as well an actor with a task in the e-Signatory. As soon as they have completed their task, they will only have read access and the person following them in the workflow chain will have write access.
- It is possible to modify a task in e-Signatory but only for the ones which has not yet arrived in the actor **Tasks**, i.e. for tasks with the status 'Future tasks'. To do this, click on <Edit E-Signatory>.
- As long as the e-Signatory is not launched, none of the workflow actors have access to the document.

- Only the creator and the manager of the e-Signatory can launch it.
-  Once the document is registered, the e-signatory is only visible to the creator of the document, the workflow actors and the e-signatory manager.
-  If you register a document with pending e-signatory tasks, the system will close automatically all unclosed tasks. You will however receive a warning and have the possibility to send an 'INFO' task to the concerned persons.

See also

Recovering entities

Creating and using distribution lists

Definition of action codes

Modifying a saved document

Special cases : signing manually for non-Ares users

13.1.1. Declining a task

Context

When you want to refuse to execute a task or return it for modification, please use <Decline> button.

For example, if you think major changes need to be introduced in the document to sign/validate: after clicking on <decline>, a new window enables the person to encode the name of the person who should modify the text (by default CONTRIB code will be selected but that can be modified). The declined task will be closed with 'declined' status. Then all the information will be kept: the system automatically keeps the information that a task has been declined. For the following E-signatory actors, if one of them declines to finish a task, the person who should work in the document will receive a modification task. (That explains the CONTRIB code) but will not receive the same code (VISA or SIGN).

Method

- (1) In the 'E-signatory' tab, under 'Task' panel, click on <Decline>.

Document Filing Assignment **e-Signatory** Link

Identification

Save number :
digit.b.1.001(2012)258

Title : Expansionnisme dans les pays tiers

Type	Actions	Native	Lang.
Main document			NS

Task

Action code: CONTRIB
Assigned by: HARSÁNYI Béla (DIGIT.B.1)
Instructions:
 please handle this during my absence

To : ANDRYKIEWICZ ZMYSLONA Ewa (DIGIT.B.1.001)
Critical: NO

Actors

(2) A new E-signatory task is displayed. Following fields need to be complete:


Decline and assign new task

Action code	Last Name - First Name	Organisation / Service	Deadline	Critical
Assigned to*: CONTRIB	VAN DEYCK Jurgen	DIGIT.B.4.003	<input type="text"/> <input type="button" value="Calculate"/>	No
Instructions*: <input type="text"/>				

- (a) 'Action code': 'CONTRIB' code is selected by default. This may be modified from the drop-down menu (compulsory field).
 - (b) 'Last name-first name': the field is by default empty. (compulsory field).
 - (c) Deadline: empty field by default.
 - (d) Critical: 'no' by default
 - (e) 'Instructions': blank field by default. Compulsory
- (3) To launch the task, click on <Decline>: a new task is then sent to the chosen person. The current task is closed with 'declined' status. A new task ('launched' status) is added. The latter bears the current task comments and the new task's instructions.
- (To cancel, click <cancel>).

<div>CONTRIB</div> <div>ANDRYKIEWICZ ZMYSLONA Ewa (DIGIT.B.1.001)</div> <div>Instructions : please handle this during my absence Comments : please take care of it during my absence</div>	<div>HARSÁNYI Béla</div>	<div>03/02/2012</div>	<div>Declined on 03/02/2012 by ANDRYKIEWICZ ZMYSLONA Ewa</div>
<div>CONTRIB</div> <div>VAN DEYCK Jurgen (DIGIT.B.4.003)</div> <div>Instructions : please take care of it during my absence</div>	<div>ANDRYKIEWICZ ZMYSLONA Ewa</div>	<div></div>	<div>Launched since 03/02/2012</div>

Notes

- A new blank assignment line is automatically added after clicking on <Edit E-Signatory> for you to add new lines. Enter the recipients and then send the tasks by clicking on <Save E-Signatory>.
- If a task contains comments or instructions,  icon is automatically opened so that you can read them directly. (If there are no comments or instructions, the field is shut).

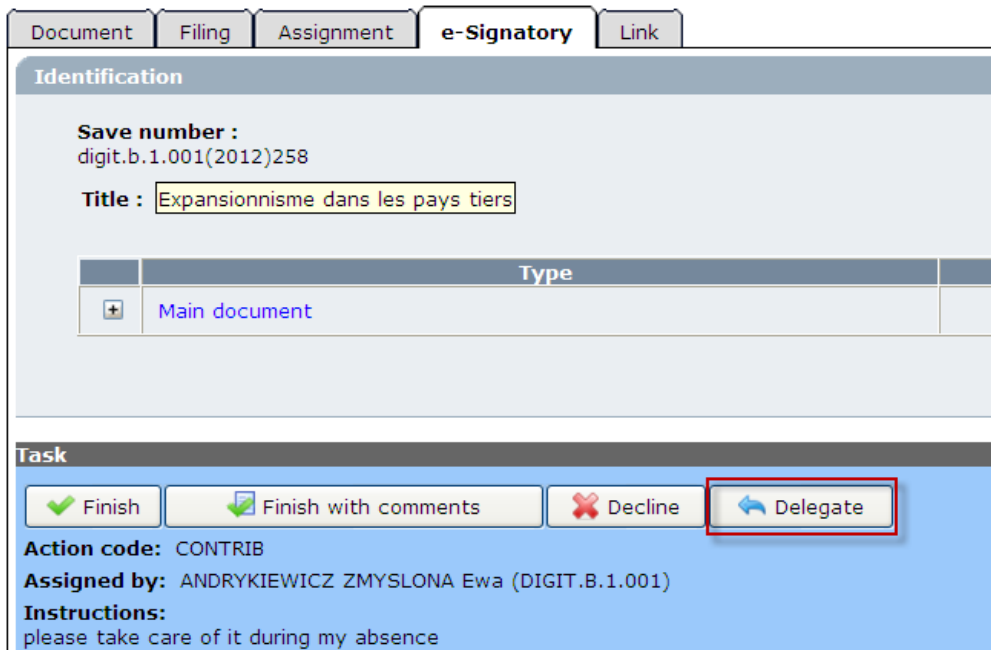
13.1.2. Delegating a task

Context

You can delegate a task to another user.

Method


- (1) Open the document assigned to you, and go to the *e-Signatory* tab page.



The screenshot shows the 'e-Signatory' tab selected in a navigation bar. Below the navigation bar, there is an 'Identification' section with the following details:


- Save number :** digit.b.1.001(2012)258
- Title :** Expansionnisme dans les pays tiers

Below the title, there is a table with one row and one column:


Type
 Main document

Below the table, there is a 'Task' section with four buttons: 'Finish', 'Finish with comments', 'Decline', and 'Delegate'. The 'Delegate' button is highlighted with a red rectangle. Below the buttons, there is text indicating the action code, assigned by, and instructions:

Action code: CONTRIB
Assigned by: ANDRYKIEWICZ ZMYSLONA Ewa (DIGIT.B.1.001)
Instructions: please take care of it during my absence

- (2) Click on <Delegate> for the relevant task.
- (3) Enter the name of the person to whom the task is to be delegated (you can either type in part of the name and use the auto-complete tool or conduct a proper search by clicking the  icon).

The software will insert the relevant organisation/service automatically.


 At this stage be absolutely sure that the name you are about to choose is the right one because you will not be able to change it later. (If you realise at this point that the name you have chosen is not the name of the person to whom you want to delegate the task, just close the window without confirming your data.)







- (4) You can enter a message in the *Instructions/Comments* field and confirm your data by clicking on <Delegate>.
- (5) When you are taken back to the *e-Signatory* tab page for the document, the pushbuttons for performing actions on the document will be greyed out.
- (6) The task line appears for the delegated person (same action code and instructions) and a task appears in that person's **Tasks** menu. The task of the delegator is said 'delegated' and disappears from his/her inbox:

Actors


Print e-Signatory

e-Signatory Manager:
KACI Emilie (DIGIT.B.1.001)
ve_digit.b.1 (DIGIT.B.1.001)

 e-Signatory **launched** by KACI Emilie on 03/02/2012

Code	Assigned to 	Deadline	Assigned by 	Closed on 	Status 
RED	KACI Emilie (DIGIT.B.1.001)		KACI Emilie	03/02/2012	Completed on 03/02/2012 by KACI Emilie
 CONTRIB	VAN DEYCK Jurgen (DIGIT.B.4.003)		ANDRYKIEWICZ ZMYSLONA Ewa	03/02/2012	Delegated on 03/02/2012 by VAN DEYCK Jurgen
Instructions : please take care of it during my absence					
Comments : please take care of it during my absence					
 CONTRIB	RAEYMAEKERS Ralph (DIGIT.B.1.001)		VAN DEYCK Jurgen		Launched since 03/02/2012
Instructions : please take care of it during my absence					
SIGN	SANDU Leontina (DIGIT.B.1.001)		KACI Emilie		
EXP	KACI Emilie (DIGIT.B.1.001)		KACI Emilie		

Notes

- You can add new assignment lines by clicking on <Edit E-Signatory>, and then by clicking on *Add*. Enter the recipients and then send the tasks by clicking on <Save E-Signatory>.
-  The delegation triggered by the <Delegate> pushbutton will be a manual one and apply only to the corresponding task. If you want to automatically delegate a batch of tasks for a specific action code, you have to use the <Preferences> pushbutton.

See also

Recovering entities

Preferences

13.1.3. Finishing a task

Context

Finishing a task means closing a task (i.e. denoting in Ares that a task has been completed). You can close a task with or without comments.

Method

- (1) Open the document assigned to you, and go to the *e-Signatory* tab page.

The screenshot shows the 'e-Signatory' tab selected in a window with tabs for 'Document', 'Filing', 'Assignment', 'e-Signatory', and 'Link'. The 'Identification' section contains a 'Save number' field with the value 'digit.b.1.001(2012)258' and a 'Title' field with the text 'Expansionnisme dans les pays tiers'. Below this is a table with a single row: a plus icon in a box followed by the text 'Main document'. The 'Task' section at the bottom has a light blue background and contains four buttons: 'Finish' (with a green checkmark), 'Finish with comments' (with a green checkmark and a document icon), 'Decline' (with a red X), and 'Delegate' (with a blue arrow). Below the buttons, it shows 'Action code: CONTRIB', 'Assigned by: VAN DEYCK Jurgen (DIGIT.B.4.003)', and 'Instructions: please take care of it during my absence'.

- (2) For the task you wish to close, click on:

This image shows a close-up of the two buttons from the 'Task' section: 'Finish' and 'Finish with comments'. Both buttons have a green checkmark icon.

- (a) <Finish>: a simple click on this pushbutton closes the task automatically .
- (b) <Finish with comments>: .type in your comments and confirm your data by clicking on <Finish> again

The current date is automatically written as the 'closed on' date for the assignment.

- (3) When you are taken back to the document, go to the *e-Signatory* tab page to make sure that the assignment line in question has been closed.

See also

Recovering entities

Practical example: answering a document

13.1.4. The 'Bypass' of the Task

Context

This feature allows the user to bypass one or more tasks **not completed** in an E-Signatory.



The bypass is available for read tasks, not yet closed.

The 'Bypass' is used, for example, when a task is blocked by someone who is absent. This moves the task on to the next workflow participant.

The actors allowed to perform a bypass are:

- The creator of the document related to the E-Signatory
- The E-Signatory Manager
- Any person with a SIGN code in the workflow

Method

- (1) Click on the button <Bypass E-Signatory>

Document Filing Assignment **e-Signatory** Link

Identification

Save number :
digit.b.1.001(2013)314

Title : e-sign

Type
No file imported

Task

☒ Finish
 ☒ Finish with comments
 ☒ Decline
 ☐ Delegate

Action code: CONTRIB

Assigned by: KAKURU RADHA Madhava (DIGIT.B.1.001)

Instructions:


Actors

e-Signatory Manager:
KAKURU RADHA Madhava (DIGIT.B.1.001)



e-Signatory launched by KAKURU RADHA Madhava on 05/08/2013

Code	Assigned to
CONTRIB	KAKURU RADHA Madhava (DIGIT.B.1.001)
CONTRIB	DELHAUWE Gregory (DIGIT.B.1.001)
VISA	KACI Emilie (DIGIT.B.1.001)

The system displays a new window with the list of tasks of the E-Signatory with the possibility of bypassing uncompleted tasks.

- (2) Tick the task(s) you would like to bypass. (only tasks not completed). The sign  appears next to a line when it is not possible to bypass it:

Bypass e-Signatory -- Webpage Dialog

Action code	Last Name - First Name	Organisation / Service	Deadline	Critical	Bypass e-Signatory
CONTRIB	KAKURU RADHA Madha	DIGIT.B.1.001		<input type="checkbox"/>	
CONTRIB	DELHAUWE Gregory	DIGIT.B.1.001		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Bypass comment: Mr Delhauwe is on mission					
VISA	KACI Emilie	DIGIT.B.1.001		<input type="checkbox"/>	<input type="checkbox"/>
SIGN	ANDRYKIEWICZ ZMYSL	DIGIT.B.1.001		<input type="checkbox"/>	<input type="checkbox"/>
EXP	BHAGAT Khushboo	DIGIT.B.1.001		<input type="checkbox"/>	

- (3) Use the buttons <Bypass> or <Cancel Modification> to complete the action and close the modal window.

– <Bypass E-Signatory>: the system performs a Bypass of the selected task

- <Cancel Modification>: returns the user to the previous state (no Bypass made).

You can type 'comments'.

When a user confirms the Bypass of the tasks, the system displays the window of the E-Signatory tasks. It is indicated on each bypassed line, the person's name and the date of Bypass.

Actors

Edit e-Signatory

Bypass e-Signatory

Print e-Signatory

e-Signatory Manager:
KAKURU RADHA Madhava (DIGIT.B.1.001)

e-Signatory launched by KAKURU RADHA Madhava on 05/08/2013

	Code	Assigned to	Deadline	Assigned by	Closed on	Status
<div></div>	CONTRIB	KAKURU RADHA Madhava (DIGIT.B.1.001)		KAKURU RADHA Madhava	16/09/2013	Bypassed on 16/09/2013 by KAKURU RADHA
Comments : Mr Kakuru is not in the office at the moment						
<div></div>	CONTRIB	DELHAUWE Gregory (DIGIT.B.1.001)		KAKURU RADHA Madhava	16/09/2013	Bypassed on 16/09/2013 by KAKURU RADHA
Comments : Mr Delhauwe is on mission						
	VISA	KACI Emilie (DIGIT.B.1.001)		KAKURU RADHA Madhava		Launched since 16/09/2013
	SIGN	ANDRYKIEWICZ ZMYSLONA Ewa (DIGIT.B.1.001)		KAKURU RADHA Madhava		
	EXP	BHAGAT Khushboo (DIGIT.B.1.001)		KAKURU RADHA Madhava		

13.1.5. End Of E-Signatory

Context

In case of a saved document when the last person of the E-Signatory wants to close the Task he will receive a warning from the system: all saved documents need to be register and filed. The user will also have the option to delete the document the saved document at the end of the workflow.

Method

- (1) At the end of the E-signatory workflow, when the user click on <Finish> the reminder message will appear

End e-Signatory:

Any document must be registered, filed or sent to the trash bin.
The task will be closed automatically.

Comments:

Register
Trash bin
Filing
Cancel

You can insert a comment, you have three options:

- <Register> To register the document, you will redirect to the tab Document in Write mode, you click on <Register and Send> and <Confirm>.
- <Trash bin> This button delete the document, sending it to the trash bin

- <Filing> This button redirects you to the 'File' tab where you can proceed with the Filing of the document. Your task will be automatically closed

Note

If the document is not registered yet, the creator and the manager of the e-signatory can add a new task even if the last task of the e-signatory had already been closed. ('E-signatory' tab, 'Edit E-signatory').

13.1.6. 'Signed by' in 'Document' tab

Context

Registered documents: the name of the person (or 'on behalf of') who signed the document is displayed on the 'Document' tab. (i.e. the name of the person who had a SIGN task code in the e-signatory). Closing date and time are also displayed.

'Signed by...' is a useful information for the readers of the document that do not have access to the E-signatory.

Document	Filing	Assignment	e-Signatory	Link
Identification				
Registration number : Ares(2012)125		Save number : digit.b.1.001(2012)199		Registration date : 24/01/2012
Title : En réponse à votre demande d'intervention dans les frais de transport				
	Type	Ares	Native	Lang.
	Main document			NS
	External ref.			
I/E	Sent by	Service/Organisation	I/E	TO/CC
I	SANDU Leontina	(DIGIT.B.1.001)	I	TO
				MAALOE Sidsel
<p>Mail type : Internal Creation date : 24/01/2012 Creator : KACI Emilie Register author : KACI Emilie Level of sensitivity : Normal Document encrypted : No Encryption Expiration Date : Comments : Signed by : SANDU Leontina (SANDU Leontina) on 24/01/2012 11:38:55</p>				
<p>Document date : 24/01/2012 Sent date : 24/01/2012 Marking : Marking Expiration Date : Person concerned :</p>				

Notes

- If several persons have received a SIGN code in the document, all names are displayed in the 'document' tab:

Signed by : SANDU Leontina (SANDU Leontina) on 2011-01-26 09:03:15
 O'CUILLEANAIN Nicholas (O'CUILLEANAIN Nicholas) on 2011-01-26 09:02:35

- This information is empty if no SIGN code has been given in the e-signatory or if the task is manual. This is no retroactive information for documents registered before Ares 1.6.



13.2. Special cases : signing manually for non-Ares users

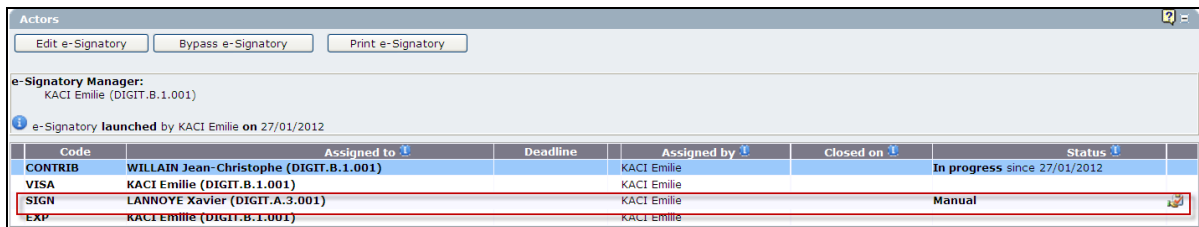
Context

When an e-Signatory actor is not an Ares user, it will still be possible to have a workflow but it will switch to **manual mode** for this user. The e-Signatory procedure will continue in the form of an e-mail exchange, collaboration via an internal network.

Users considered as 'manuals' for Ares are: the users whose service/ DG does not have access to Ares (for example users who are working for a delegation that is not using Ares) or users with 'NoAresAccess' profile. All external users are also considered 'manuals' for Ares.

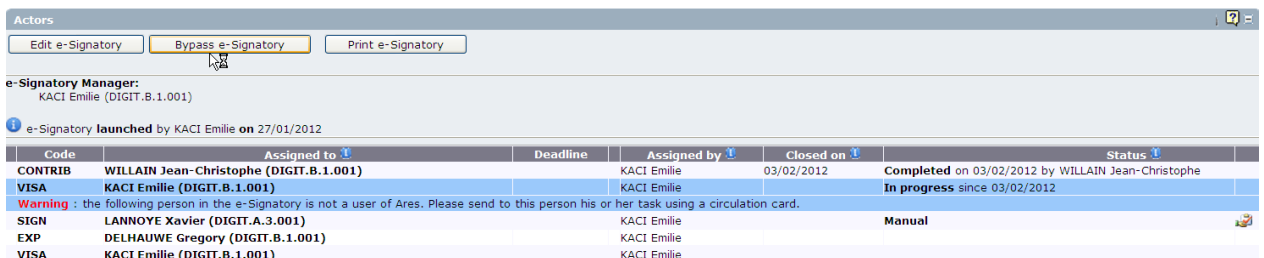
Method

- (1) If you confirm the e-Signatory (i.e. click on <Save E-Signatory>) and one of the persons involved in the workflow is not an Ares user (in our example, Xavier LANOYE), the icon  denoting a manual task () will appear beside that person's assignment line.



Code	Assigned to	Deadline	Assigned by	Closed on	Status
CONTRIB	WILLAIN Jean-Christophe (DIGIT.B.1.001)		KACI Emilie		In progress since 27/01/2012
VISA	KACI Emilie (DIGIT.B.1.001)		KACI Emilie		
SIGN	LANNOYE Xavier (DIGIT.A.3.001)		KACI Emilie		Manual
EXP	KACI Emilie (DIGIT.B.1.001)		KACI Emilie		

- (2) In the e-Signatory workflow, the preceding actor (in this case, KACI Emilie) receives a message informing him that the next task in the workflow will be a manual task. It is her/his responsibility to pass on the document to the next person in the workflow (i.e. LANNOYE Xavier) by some means other than via Ares (e.g. by e-mail or by creating a printout).



Code	Assigned to	Deadline	Assigned by	Closed on	Status
CONTRIB	WILLAIN Jean-Christophe (DIGIT.B.1.001)		KACI Emilie	03/02/2012	Completed on 03/02/2012 by WILLAIN Jean-Christophe
VISA	KACI Emilie (DIGIT.B.1.001)		KACI Emilie		In progress since 03/02/2012
Warning : the following person in the e-Signatory is not a user of Ares. Please send to this person his or her task using a circulation card.					
SIGN	LANNOYE Xavier (DIGIT.A.3.001)		KACI Emilie		Manual
EXP	DELHAUWE Gregory (DIGIT.B.1.001)		KACI Emilie		
VISA	KACI Emilie (DIGIT.B.1.001)		KACI Emilie		


- (3) After doing so, he can close their task. The task will appear with the status 'Completed' in their **Tasks** menu.

- (4) The task will then pass directly to the next Ares user (in this example, DELHAUWE Grégory). This user will receive a message telling them to await reception of the document – for example, as a signed hardcopy or by e-mail – before continuing.

Actors					
<div>Edit e-Signatory</div> <div>Print e-Signatory</div>					
e-Signatory Manager: KACI Emilie (DIGIT.B.1.001)					
e-Signatory launched by KACI Emilie on 27/01/2012					
Code	Assigned to	Deadline	Assigned by	Closed on	Status
CONTRIB	WILLAIN Jean-Christophe (DIGIT.B.1.001)		KACI Emilie	03/02/2012	Completed on 03/02/2012 by WILLAIN Jean-Christophe
VISA	KACI Emilie (DIGIT.B.1.001)		KACI Emilie	03/02/2012	Completed on 03/02/2012 by KACI Emilie
SIGN	LANNOYE Xavier (DIGIT.A.3.001)		KACI Emilie		Manual
EXP	DELHAUWE Gregory (DIGIT.B.1.001)		KACI Emilie		Launched since 03/02/2012
Warning : the preceding person in the e-Signatory is not a user of Ares. Please wait to receive the circulation card signed before carrying out the execution of your task.					
VISA	KACI Emilie (DIGIT.B.1.001)		KACI Emilie		

- (5) This user then closes his/her task.

Note

To display the name of an action code in full, click on the  icon.

See also

Entering E-Signatory data

Registering a document

Filing a registered document (mandatory)

13.3. Outgoing document requiring hand written signature

Context

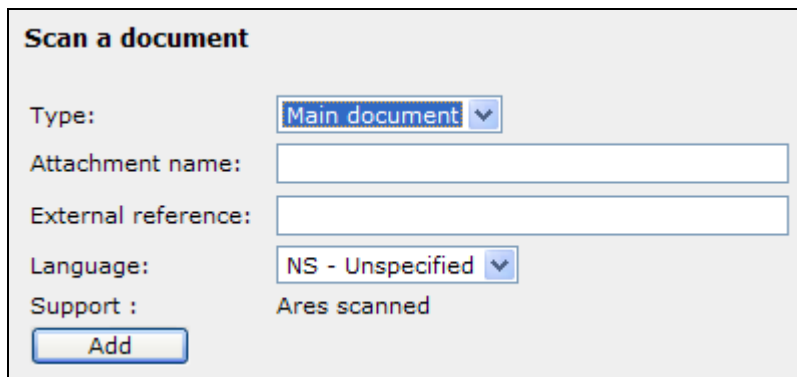
Some outgoing documents require a handwritten signature (e.g. following the e-Signatory procedure for documents relating to contracts, tenders, SLAs).

If you want to send the original signed document to an external recipient, please follow the steps below:

Method

- (1) Click on <Add new> to create the document in Ares (see Module 2 for details)
You may import an attachment.
- (2) Click on <save>.
- (3) Create and launch an E-signatory.
- (4) At the level of SIGN task, the document is printed and signed (with no Ares number).

- (5) Modify your document to prepare a divider: click on <scan> :



Scan a document

Type: Main document ▼

Attachment name:


External reference:

Language: NS - Unspecified ▼

Support : Ares scanned

Add

- (6) Complete the attachment data:

- (a) Select the type of document: *main document*, *cover page* or *annex*
- (b) Enter the *Attachment name*.
 You cannot enter special characters ('/', '*', '?', etc.) in the *Attachment name*. Ares automatically detects these as they are entered (the text becomes red) and it is impossible to add the attachment.
- (c) Enter the *External reference* if necessary (reference number of the mail given by the sender outside the Commission)
- (d) Select the *Language* of the attachment.
- (e) The support will be automatically detected and displayed as *Ares scanned*.
- (f) Click on <Add>

- (7) Save the document.

- (8) In the *Identification* area of the document, click on the barcode corresponding to the attachment.








- (9) Enter the divider information to be able to print it:

Print divider
Attachment name:
Two-sided scanned document: ☐
Total number of sides:
Modification authorised: ☐ (Until 30/06/2008 16:04)
Divider valid until: ☐ (Until 01/07/2008 15:04)

- (a) The *Attachment name* is entered automatically.
 - (b) Tick the following checkbox to scan the document on both sides. The back side of the divider will not be scanned. (If the box has not been chosen for a two-sided document, the first scanned page will be empty).
 - (c) Indicate the total number of pages.
 - (d) Tick the following checkbox if you authorise the modification of the document.
 - (e) Tick the last checkbox if you want to set an expiry date for using the divider.
 - (f) Click on <Print> to start printing the divider.
- (10) Continue the procedure on the correct copier
- (a) Put the divider which you have just printed in the appropriate copier, followed by the document(s) to be scanned.
 - (b) Select the button for scanning (Ares).
- (11) The document is automatically scanned and sent to Ares as an attachment.
- (12) Finish the SIGN task.
- (13) Register the document (at EXP task for example). If the original signed document has to be sent to an external recipient, the Ares number and registration date are manually added to the paper original.

Notes

-  This procedure can take a few minutes (that is why the stamp might not be visible immediately).
-  **You must check that the file has been scanned before registration.** If you do not scan, the system will not allow you to continue with registration.

Content						
Attachment Name	Attachment Date	Language	External reference	Owner	Support	Actions
expeditions furniture	26/04/2010	English			Ares scanned	  
<input type="button" value="Import"/> <input type="button" value="Scan"/>				<div>You must scan the attachment before registering the document</div>		

- Moreover, it will not be possible to scan after registration: neither the printing of the divider nor the scanning will be allowed.

See also

Creating a new document, entering and saving data

Scanning

Entering E-Signatory data

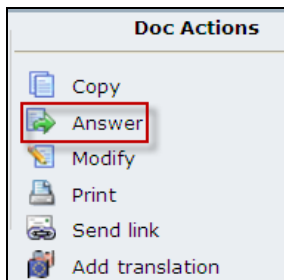
13.4. Practical example: answering a document

Context

A registered document can be used to generate a reply.

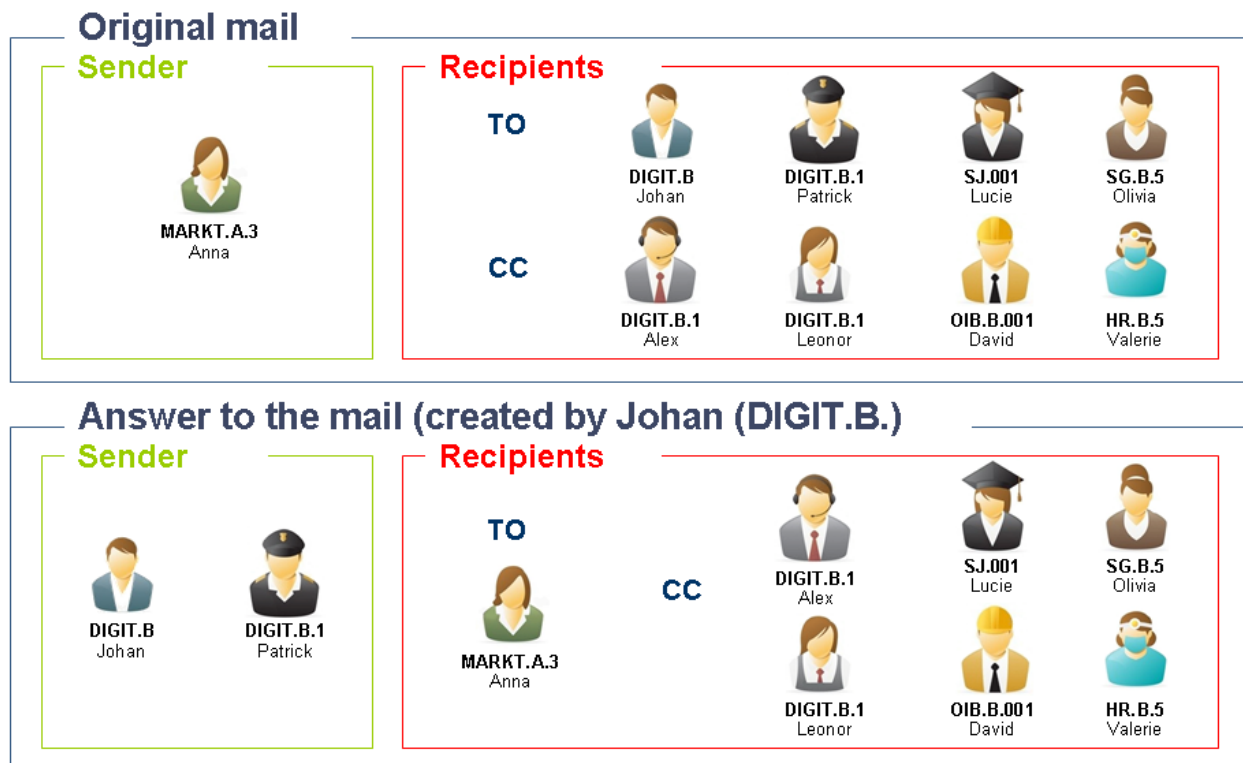
Method

- (1) Open the document assigned to you, and go to the *Assignment* tab page.
- (2) Click on the <Answer> pushbutton at the top left of the screen with the document details.



- (3) Complete the fields of the new document. Some metadata will be inserted from the original document:
 - (a) Mail type: according to the type of the original document, Ares will automatically selects the appropriate mail type:


- If the original document was an internal mail= the answer will be an internal mail
 - If the original mail was an incoming document= the answer will be an outgoing document
 - If the original document was an outgoing document= the answer will be an incoming mail
- (b) The original title will be fully kept
- (c) Senders and recipients will be kept from the initial document:
- The main recipients belonging to the DG of the person who prepares the answer (ie the recipients that were in 'to') will be then the senders of the answer
 - The other recipients (the recipients that were in copy 'cc') and all the recipients from others DG will be then put as recipients in copy
 - The main sender will be then main recipient in the answer

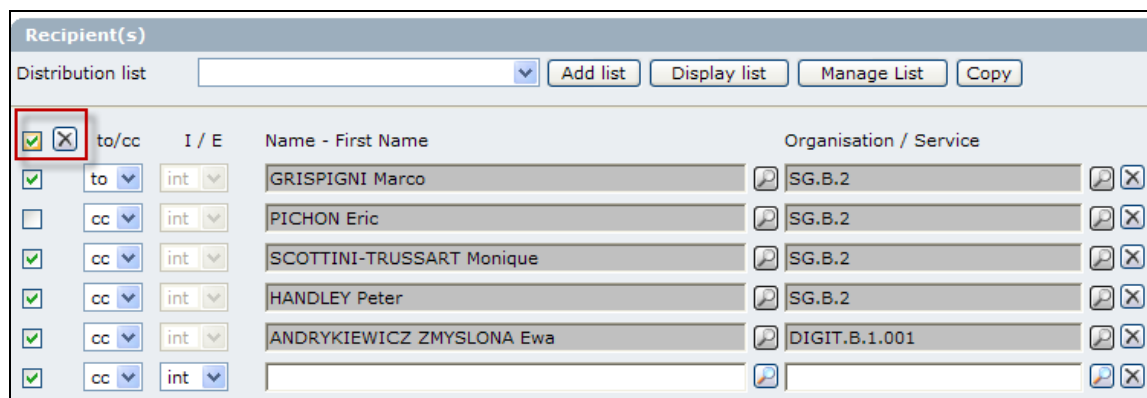


- (d) The previous filing will be kept (but only if the creator of the answer is at least 'filing user' of the corresponding files and if the file is 'active')
- (e) If there was a marking it will be kept in the answer document

(4) Click on <Save> or <Register and Send>.

Notes

- The following metadata will not be kept: the attachments, the comments, the person concerned and the dates. Moreover, if the button 'not to be filed' had been pushed in the original document, this information will not be kept for the reply.
- The original registered document is automatically inserted on the *Link* tab page of the answer (with a link of the type 'Request').
- If a sender or a recipient has left the Commission or changed post, he will be automatically deleted in the reply.
- 'Recipient(s)' field:  button deletes several recipients at the same time in a document.



The screenshot shows the 'Recipient(s)' window. At the top, there's a 'Distribution list' dropdown and buttons for 'Add list', 'Display list', 'Manage List', and 'Copy'. Below is a table with columns: 'to/cc', 'I / E', 'Name - First Name', and 'Organisation / Service'. Each row has a checkbox on the left and a small 'X' icon in a box next to it. The first row is highlighted with a red box around the checkbox and the 'X' icon.

	to/cc	I / E	Name - First Name	Organisation / Service
<input checked="" type="checkbox"/>	to	int	GRISPIGNI Marco	SG.B.2
<input type="checkbox"/>	cc	int	PICHON Eric	SG.B.2
<input checked="" type="checkbox"/>	cc	int	SCOTTINI-TRUSSART Monique	SG.B.2
<input checked="" type="checkbox"/>	cc	int	HANDLEY Peter	SG.B.2
<input checked="" type="checkbox"/>	cc	int	ANDRYKIEWICZ ZMYSLONA Ewa	DIGIT.B.1.001
<input checked="" type="checkbox"/>	cc	int		

See also

Creating a new document, entering and saving data

Adding an attachment to the document: Importing or Scanning

Managing links

13.5. Managing links between documents

Context

Ares enables you to have links between documents. For example, you can use links within larger files with many registrations to link documents dealing with similar issues but filed in different files, to link an original document and its response, or to link duplicates.

Method


- (1) Go to the *Link* tab page of the document.
- (2) Click on <Add link>:





The screenshot shows the 'Link' tab in the Ares interface. At the top, there are tabs for Document, Filing, Assignment, e-Signatory, Link (selected), and External Transmission. Below the tabs, the 'Identification' section displays document details: Registration number (Ares(2010)1760), Save number (digit.b.1.001(2010)3515), and Registration date (22/09/2010). The Title is 'Contracts SocieteX and CE'. A table lists document parts: 'Cover note' (Type: Ares, Native: NS, Size: 0.0 MB, Pages: 1) and 'Annex' (Type: Ares, Native: NS, Size: 0.05 MB, Pages: 1). On the right, 'Doc Actions' include Copy, Answer, Modify special, Print, Send link, Add translation, and Manage procedure. At the bottom, there is a table for linked documents with columns: Document title, Link, Creation date, Registration number, and Save number. The table is currently empty, and an 'Add link' button is visible at the bottom left.

- (3) In the *Type of link* field, select *Response*, *General* or *Duplicates* from the drop-down list:













The screenshot shows the 'Add a link' dialog box. At the top, it says 'Ares - Add a link - Microsoft Internet Explorer provided by European Commission'. Below this, a message states: 'To add a link, you must first define a type and then search the document which you want to link.' The 'Type of link' dropdown is set to 'General'. The 'Search Criteria: Full text search' section includes a 'Text' input field and radio buttons for 'The exact phrase', 'All words' (selected), and 'One word at least'. There are also checkboxes for 'Senders' and 'Recipients', and radio buttons for 'Internal' (selected) and 'External'. The 'Person or virtual entity' and 'Organisation' input fields are present. A 'Search' button and a 'Reset' button are at the bottom of this section. The 'Search Criteria: Documents' section includes input fields for 'Title/Subject', 'Sender', 'Recipient', 'Registration number', 'Save number', and 'Comments', each with a 'contains' dropdown and a search button. The 'Sender' and 'Recipient' fields also have a dropdown for 'Any organisation for a person' and a search button.

- (a) '*Response*' (or '*Request*' for the other document) enables you to link incoming mail with outgoing mail. The link to the original document will be of the type '*Request*' and the link to the answer will be of the type '*Response*'.
- (b) '*Duplicates*': when the system detects duplicates, you can opt to create a link between the two documents. Both directions of this link will be of the type '*Duplicates*'.



- (c) 'General': you use this for all other links. Both directions of this link will be of the type 'General'.
- (4) Find the document you want to link. Using either a simple or advanced search, enter your search criteria and click on <Search> or press <Enter>.
- (5) To link a document, click on the appropriate icon (.



Search results				
4 item(s) found, displaying 1 to 4. Page(s): 1. Item(s) per page: 10 Show all				
	Title/Subject	Save Number	Registration number	Registration date
	Thank you letter of the participation in the Microsoft leaders (Emilie)	digit.b.4(2008)8	Ares(2008)2	14/03/2008
	Thank you letter for Microsoft	digit.b.4(2008)41		
	Thank you letter Microsoft	digit.b.4(2008)40	Ares(2008)17	17/03/2008
	Thank you letter of the participation in the Microsoft leaders (Emilie)	digit.b.4(2008)20		

- (6) The link is confirmed automatically and displayed in the areas where documents are identified.

Document	Filing	Assignment	e-Signatory	Link	External Transmission																					
Identification Registration number : Ares(2010)1760 Save number : digit.b.1.001(2010)3515 Registration date : 22/09/2010 Title : <u>Contracts Societex and CE</u>																										
<table border="1"> <thead> <tr> <th>Type</th> <th>Ares</th> <th>Native</th> <th>Lang.</th> <th>External ref.</th> <th>Size</th> <th>Pages</th> </tr> </thead> <tbody> <tr> <td>Cover note</td> <td></td> <td></td> <td>NS</td> <td></td> <td>0.0 MB</td> <td>1</td> </tr> <tr> <td>Annex</td> <td></td> <td></td> <td>NS</td> <td></td> <td>0.05 MB</td> <td>1</td> </tr> </tbody> </table>						Type	Ares	Native	Lang.	External ref.	Size	Pages	Cover note			NS		0.0 MB	1	Annex			NS		0.05 MB	1
Type	Ares	Native	Lang.	External ref.	Size	Pages																				
Cover note			NS		0.0 MB	1																				
Annex			NS		0.05 MB	1																				
<table border="1"> <thead> <tr> <th>Document title</th> <th>Link</th> <th>Creation date</th> <th>Registration number</th> <th>Save number</th> </tr> </thead> <tbody> <tr> <td>FW, infos importantes , support changement num de sauvegarde</td> <td>General</td> <td>11/03/2011</td> <td>Ares(2011)535</td> <td>digit.b.1.001(2011)1044</td> </tr> </tbody> </table>						Document title	Link	Creation date	Registration number	Save number	FW, infos importantes , support changement num de sauvegarde	General	11/03/2011	Ares(2011)535	digit.b.1.001(2011)1044											
Document title	Link	Creation date	Registration number	Save number																						
FW, infos importantes , support changement num de sauvegarde	General	11/03/2011	Ares(2011)535	digit.b.1.001(2011)1044																						
<input type="button" value="Add link"/>																										

Notes

-  An asterisk beside the *Link* tab means that at least one link has been saved for the document in question. This means you do not have to open the tab page to see if a link exists.
- You must have read access to the document to add links.
- Security settings also determine whether links are displayed; you must have access to the document to which the link leads.
- You can create links between saved or registered documents.
- Each link between two documents is bi-directional. The link will appear on the *Link* tab page of both documents.
-  When you create a link of the type 'Response' the original document will automatically have a link of the type 'Request'.
- To access document details, click on the hyperlink in the *Title* column.

- The  icon is a tooltip for displaying summarised document information.
- The  icon allows you to delete the corresponding line.
- You can link to further documents by clicking on <Add link> again.
- To go back to the previous screen without saving your changes, simply click on <Cancel> at any time.
- The <Reset> pushbutton clears the criteria and results of the previous search so that you can specify data for a new search.

See also

Checking for duplicates

Finding documents, files or tasks

14. MODULE 14: ASSIGNMENTS AND E-SIGNATORY WORKFLOW SECURITY

14.1. Definition of security

Please find below a summary of the security linked to workflows. In order have a better understanding of the table, here are a reminder of a few points:

The list of roles on a document :

- **Sender and receiver** of the document
- **Creator** of the document
- **File readers**: file users/file readers/file editors on any files where the document is filed in
- **E-signatory manager**
- **E-signatory SIGNAT** actors (task with code action Signat)
- **Actors** on an assignment and/or on a e-signatory workflow
- **E-signatory active actor**



A user may have one or several roles on the same document.

14.2. Summary table of security

Please find hereafter the actions available on a document. Those actions may be divided into 4 categories:

1. Workflow e-signatory actions
 - a. **(RE)** Read of the e-signatory workflow of a document
 - b. **(EE)** Edition of the e-signatory workflow of a document
 - c. **(LE)** Launch of the e-signatory workflow of a document
 - d. **(BE)** By-pass of some e-signatory participants of a document
2. Workflow assignment actions
 - a. **(RA)** Read the assignment workflow of a document
 - b. **(EA)** Edition of the assignment workflow of a document
3. Filing actions
 - a. **(RF)** Read of the files where the document is filed
 - b. **(F)** File/unfile/trash of a document
 - c. **(EF)** Edition of a file (add/remove file readers)
4. Registration action

a. **(REC)** Registration of a document



A user can perform several actions on a document. These actions depend both on the user's role on the document at a specific moment and on the state of the document.

Here are the list of authorisations on a document :

1. None : No access on the document
2. Read (R): This permission represents a full read access on the document:
 - a. Read access on the document's metadata
 - b. Read access on all attachments' metadata
 - c. Read access on all attachments' contents
 - d. Finally allow the following actions on the document: RF, RE and RA
3. Write (W): This permission represents a full write access on the document:
 - a. Write access on the document's metadata
 - b. Write access on all attachments' metadata
 - c. Write access on all attachments' contents
 - d. Finally allow the following actions on the document: RF, RE and RA

The table explains the authorisations and actions for each role, at each state of the document (Document State). The table is made of:

- Column headers= roles
- Row headers = state of the document
- table cases = authorisations and actions

For example, the table answers the following question: what are the available authorisations and actions on a saved document with an e-signatory with the user as ' E-signatory manager'?

	Document state	Sender Receiver	Creator	File Reader	Attr. Actors	Esig. Manager	Esig. Actors	SIGNAT Actors	Active Actor
1	Saved	/	ED F EA EE EV RV	R	/	/	/	/	/
2	Saved with attrib. launched	/	ED F EA EE EV RV	R	F EA	/	/	/	/
3	Saved with e-sign.	/	ED F EA EE LE EV RV RE	R RE RV	/	R EE LE F RE	/	/	/
4	Saved with e-sign. launched	/	ED F EA EE BE EV RV RE	R	/	R EE BE F RE	R F RE RV	R BE F RE RV	ED F EE EA EV RV RE
5	Saved with e-sign. paper	/	ED F EA EE EV RV RE	R RE RV	/	R EE F RE	R F RE RV	R F RE RV	/
6	Saved with attrib. launched and e-sign.	/	ED F EA EE LE EV RV RE	R RE RV	R F EA RE RV	R EE LE F RE	/	/	/
7	Saved with attrib. launched and e-sign. Launched	/	ED F EA EE BE EV RV RE	R RE RV	R F EA RE RV	R EE BE F RE	R F RE RV	R BE F RE RV	ED F EE EA EV RV RE
8	Saved with attrib. launched and e-sign. paper	/	ED F EA EE EV RV RE	R RE RV	ED F EA RE RV	R EE F RE	R F RE RV	R F RE RV	/
9	Registered	R F EA	R F EA RV	R F EA	/	/	/	/	/
10	Registered with attrib. launched	R F EA	R F EA RV	R F EA	R F EA	/	/	/	/
11	Registered with e-sign.	R F EA	R F EA RV RE	R F EA	/	R F RE	/	/	/
12	Registered with e-sign. Launched	R F EA	R F EA RV RE	R F EA	/	R F RE	R F EA RE RV	R F EA RE RV	/
13	Registered with e-sign. paper	R F EA	R F EA RV RE	R F EA		R F RE	R F EA RE RV	R F EA RE RV	/
14	Registered with attrib. launched and e-sign.	R F EA	R F EA RV RE	R F EA	R F EA	R F RE	/	/	/
15	Registered with attrib. launched and e-sign. Launched	R F EA	R F EA RV RE	R F EA	R F EA	R F RE	R F EA RE RV	R F EA RE RV	/
16	Registered with attrib. launched and e-sign paper	R F EA	R F EA RV RE	R F EA	R F EA	R F RE	R F EA RE RV	R F EA RE RV	/

15. MODULE 15: CREATING EXTERNAL ENTITIES

15.1. Defining entities

'Entity' refers to any piece of data on a person or organisation. Entities may be internal or external.

15.1.1. Internal entities

'Internal entity': any person, as well as the internal body to which that person belongs, which is part of the Commission (Directorates-General/Departments, offices, agencies, representations, delegations, cabinets, etc.) and which is listed in the Commission Outlook Address Book. The database in which internal entities are managed will be updated very regularly.



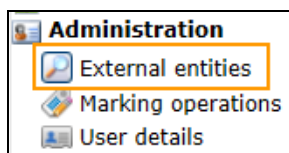
Internal entities will be valid across the entire Commission and you will not be able to create them in Ares.

15.1.2. External entities

External entities are organisations or persons who interact with the Commission but are not part of it. This includes companies, citizens, national administrations and even other European institutions (the European Parliament, the Council, etc.). Data concerning external entities can be used by all the DGs. It can be encoded (both for persons and bodies) freely but only by the user with the appropriate role (all profiles except 'noAresaccess'). Furthermore, the e-Domec guidelines²⁴ must be complied with.

To avoid having duplicates, always conduct a thorough, comprehensive search before you create a new entity. New data is checked by means of internal validation at DG level. Once checked, this new data can be fed into the common database.

Creating and searching for external entity (person and/or organisation) can be done when creating a new document (*Document/ add new*) or from the menu '*Administration/ external entities*':

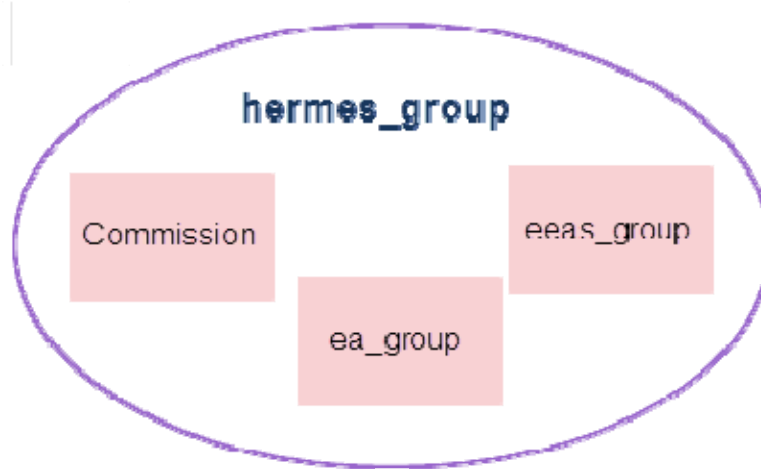


²⁴ Guidelines on encoding in the applications using the Hermes platform:
http://www.cc.cec/home/dgserv/sg/i/edomec/doc/manuel/GL_ent_ext.pdf

15.1.3. Executive agencies

Executive Agencies do not belong to the European Commission and they should not be the same way as Commission DGs or services. However executive agencies are not really external entities as member states or citizens.

In order to correctly manage this situation, **executive agencies users are included in a specific group: 'ea_group'. A superior group includes the Commission, Executive Agencies and E.E.A.S: 'hermes_group'.**



Filing plan Commission common headings: 'hermes_group' is 'file reader'.

In order to share files among the Commission and the Executive agencies or EEAS: please add the necessary people/agencies in the corresponding roles of the files. (identical rule with the sharing of files among the Commission DGs).



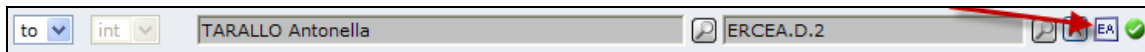
Users with multiple main job assignments and detached to an Executive Agency **will only appear in the Autocomplete and Search functionality** (from current base) as users from the Executive Agencies.





EA icon is automatically displayed next to the Executive Agencies users, when they are:

- Creator of a document
- Register author of a document
- Sender of a document
- Recipient of a document
- Sender of a task

- Recipient of a task
- Member of a distribution list
- Delegate (in 'preferences' tab and in a task)




Notes

- If some external agencies were created as 'external' prior to this release, they will be deleted from the current database.
- If the sender or recipient is an administrative entity of an executive agency,  icon is displayed next to the organisation.
-  icon is not displayed in the reports, in a search results, in the deadline report, in the profiles management, in the filing plan/in the files, in the virtual entities, in the 'person concerned' field, Notis et Areslook.

15.2. Creating an external entity

15.2.1. Creating an external person

- (1) In the *Sent by* or *Recipient(s)* field group on the screen where you enter data for a document, select the option 'ext' from the drop-down list to the left of the *Last Name-First Name* field and, in the field itself, type in the name of the relevant external person.
- (2) If the autocomplete tool does not propose the person, you can search for the entity's last name and first name by clicking on the  icon.

The screen that appears allows you to conduct an in-depth search for the external person.



Don't specify too many details and run the search several times to make sure that you do not end up creating a duplicate.

- (a) Select the level of validation. You can filter persons linked or not to an organisation.

- (b) Fill the criteria needed for your search (at least one) and press <Search>:

- (c) Corresponding results are displayed:

	Action	Name	Acronym	City	Country	Creator	Creation	Last modif.	Level
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Cefora		Bruxelles	BE	willajh	19/09/2012	19/09/2012	2
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	erf			NZ	kakurma	13/09/2012	13/09/2012	2
<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	La Bergerie du Haut Plateau	BHP	Herve	BE	willajh	24/09/2012	24/09/2012	2
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	test mak01				raeymfh	26/09/2012	26/09/2012	2
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Trasys	TR	Bruxelles	BE	willajh	10/09/2012	19/09/2012	2
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	University of Oxford		Oxford		tanghga	24/09/2012	24/09/2012	2
<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	zzzzzz				kakurma	02/10/2012	02/10/2012	2

- (3) Click on the entity's name or on button to see its details
- (a) The <Add a new person> pushbutton takes you to the screen for creating an external person.
- (b) The <Reset> pushbutton removes existing data from the search criteria fields.
- (c) The <Cancel> pushbutton closes the window and, without saving your data, takes you back to the page for creating a document.
- (4) If your search is successful, select the relevant entity²⁵. The entity will be inserted automatically on the metadata entry page for your document.

If your search found no duplicates, you can click on < Add a new person>. You have the option of associating this external person with an organisation. If you need to create a new person that should be linked to a new organisation, please search for the organisation using the magnifying glass button. If it does not exist, you can create it through <Add a new organisation> button (see details below).

²⁵ If the entity already exists in the application but contains errors, contact the person(s) with the profile 'DMO' or 'CAD' in your DG and get them to correct this error so that you can avoid creating a duplicate.

Person

Last name * First name

City Country

Main email Alternate email

Comments

Linked organisation

Name Acronym: Country:

Search for an existing organisation

Search criteria


☒ Organisation ☐ Person Validation : ☐ Not validated (level 1) ☒ Validated DG (level 2) ☐ Validated EC (level 3)

Name Acronym Email


City Country Internet


Creation is Last modification is ☒ Limit search to

Organisation search result

To select an organisation to link (either an organisation that already existed or a new one), click  button next to the organisation to select it:

Organisation search result

Show 20 entries 

Action	Name	Acronym	City	Cntry	Creator	DG	Creation	Last modif.	Level
 <input type="button" value="Select"/>	Trasys	TR	Bruxelles	BE	willajh	DIGIT	10/09/2012	19/09/2012	2

Showing 1 to 1 of 1 entries

'Organisation' field is empty if the person is not associated to an organisation.

Sent by *

I / E Name - First Name Organisation / Service

- (5) Enter metadata for the person, taking care to observe the encoding procedures.

Person

Last name * First name

City Country

Main email Alternate email

Comments


Linked organisation

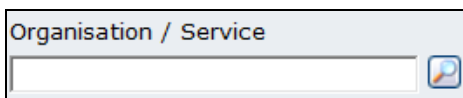
Name Acronym: Country:

- (6) To confirm your data, click on <Save>. To go back to the registration screen without saving your data, click on the <Cancel> pushbutton. (If you have CAD or DMO profile, you can directly validate the newly created entity, by pressing the <Save and validate> button).

- (7) You are now back on the registration screen. The external person you have just created has been automatically written to the relevant fields in the *Sent by* or *Recipient(s)* field group.

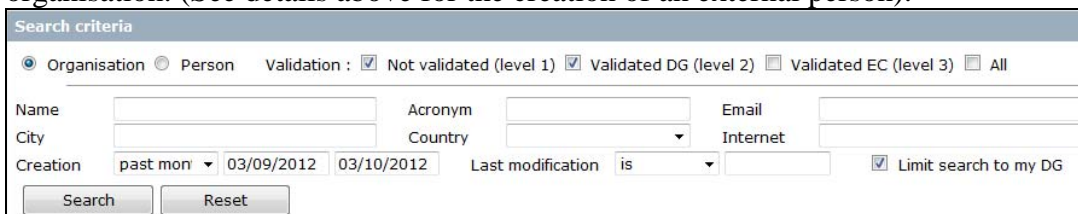
15.2.2. Creating an external organisation

- (1) In the *Sent by* or *Recipient(s)* field group on the screen where you enter data for a document, select the option 'ext' from the drop-down list to the left of the *Organisation/Service* field and, in the field itself, type in the name of the relevant external organisation.
- (2) If the autocomplete tool does not propose the organisation, you can search for the entity's organisation/service by clicking on the  icon.



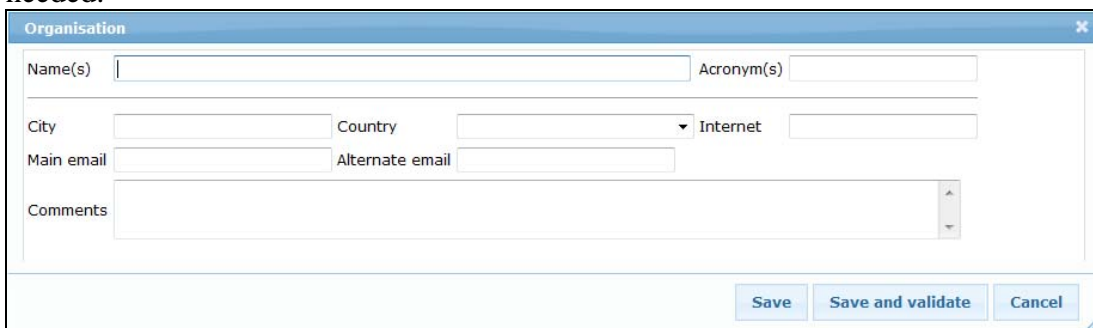
A screenshot of a web form field labeled "Organisation / Service". To the right of the text input area is a small magnifying glass icon, indicating a search function.

- (3) The screen that appears allows you to conduct an in-depth search for the external organisation. (See details above for the creation of an external person).



A screenshot of a "Search criteria" dialog box. It contains several search filters: "Organisation" (selected) and "Person" (radio buttons); "Validation" with checkboxes for "Not validated (level 1)", "Validated DG (level 2)", "Validated EC (level 3)", and "All"; and input fields for "Name", "Acronym", "Email", "City", "Country", "Internet", "Creation" (with a date range from 03/09/2012 to 03/10/2012), and "Last modification" (with a dropdown menu). There are "Search" and "Reset" buttons at the bottom.

- (4) Select of the the organisation displayed in the results of click <Add a new organisation> if needed.



A screenshot of an "Organisation" dialog box. It contains input fields for "Name(s)", "Acronym(s)", "City", "Country" (with a dropdown), "Internet", "Main email", and "Alternate email". There is also a "Comments" text area. At the bottom right, there are three buttons: "Save", "Save and validate", and "Cancel".

- (5) Click <Save>.
- (6) You are now back on the registration screen. The external organisation you have just created has been automatically written to the relevant fields in the *Sent by* or *Recipient(s)* field group.

Notes

- The field 'Organisation/Service' can contain up to 300 characters.

- The number of linked documents is visible in the details screen of an external organisation/
- Once you type the first letters of the external organisation, a number appears in front of the name. This number specifies the validation level of the organisation.
 - (1) The organisation had been created but not yet validated.
 - (2) The Organisation had been validated at DG level
 - (3) The Organisation had been validated at Commission Level



You can see all the level 1 external entities (persons and organisations) created by any Ares user, even the entities created by a user from another DG. This should avoid the creation of duplicates. Results are limited by default to the entities created in your DG. If you want to see all entities, untick <Limit search to my DG>. If there are duplicates, it is always recommended to choose level 3.

- A search for external entities is case and diacritic signs insensitive: if you search for 'u', the system will also look for 'û' and 'ü'.
- You can also see the name of the DG that has created the entity in the autocomplete:

Sent by *			
I / E	Name - First Name		Org
ext	co		
Recipient	COCCHI MICHELA	2	DIGIT
Distribution	COCO Marie		UNIVERSITE ENTR
			DE GAND
	CODREANU ALEXANDRA ANCA	2	DIGIT
<input type="checkbox"/> to	CODREANU MIHAI CRISTIAN	2	DIGIT
<input type="checkbox"/> to	COELHO Paulo	2	COELHO DIGIT
			EDITIONS
	COHEN DIANE	2	DIGIT

Organisation / Service			
de			
	DE ACERO INDUSTRIAL S&M C POR A	3	DO LEF
	DE POST VZV	3	BE LEF
	De Zwaan		BE DIGIT
	Decogest		BE DIGIT
	DEF	2	BE DGT

And in the organisation/service search results (For persons, the DG of the creator is displayed):

Organisation search result

Show 100 entries

	Action	Name	Acronym	City	Country	Creator	Creation	Last modif.	Level
<input type="checkbox"/>		Cefora		Bruxelles	BE	willajh	19/09/2012	19/09/2012	
<input type="checkbox"/>		erf			NZ	kakurma	13/09/2012	13/09/2012	
<input checked="" type="checkbox"/>		La Bergerie du Haut Plateau	BHP	Herve	BE	willajh	24/09/2012	24/09/2012	
<input type="checkbox"/>		test mak01				raeymth	26/09/2012	26/09/2012	
<input type="checkbox"/>		Trasys	TR	Bruxelles	BE	willajh	10/09/2012	19/09/2012	
<input type="checkbox"/>		University of Oxford		Oxford		tanghga	24/09/2012	24/09/2012	
<input type="checkbox"/>		zzzzzzz				kakurma	02/10/2012	02/10/2012	

Showing 1 to 13 of 13 entries

- Columns in the search results of an external entity are now sortable (click on icon corresponding on the column you would like to sort).
- You can export results clicking on icon.
- A maximum of 100 results are displayed during a search for entities.

16. MODULE 16: VIRTUAL ENTITIES AND DELEGATION

16.1. Definition of a virtual entity

A virtual entity is a fictional entity that brings together users and/or groups under an identical name. Virtual entities are the equivalent of the Outlook functional mailboxes (e.g. SG-Domec) and Commission departments (e.g. DIGIT-B-4). These entities are considered to be internal entities.

In Ares, only the term 'virtual entity' will be used.



You create virtual entities **manually** in the application.

A virtual entity may contain several persons (users) or groups. A 'profile' is assigned to a virtual entity (same behaviour as for a user). Users in the same virtual entity can belong to the same structure (e.g. the same Unit) or to different structures (e.g. a virtual entity for DMOs). The same person can belong to more than one virtual entity.



Virtual entities in Ares automatically appear in the form 've_DG_name' (e.g. 've_markt.cad').

Virtual entities have several uses. First of all, they enable you to manage a function (e.g. 'DMO EEAS') or to group together the various 'hats' that a person wears at work (e.g. a person 'acting' in a position such as Head of Unit).

You can use a virtual entity as an actor in a workflow (*Assignment* or *e-Signatory*).

For example, you can create a virtual entity called 've_markt. cad' for a DG and assign it a task.

This virtual entity will be managed in exactly the same way as other internal entities.

You can also adopt the role of a virtual entity to perform tasks such as creating documents, creating assignments and consulting the **Tasks** menu to process tasks.



When you perform tasks as a virtual entity, you are logged on with your own user name and ECAS password. Consequently, you keep your own identity even if you are acting as a virtual entity. But the profile of the virtual entity (and the actions you may perform) may be different from your own profile.

16.2. Working as a virtual entity in the system: creating a document and performing a task (scenario 1)

16.2.1. Logging on

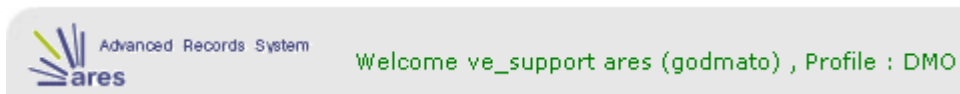
- (1) To log on as a virtual entity, you first of all log on as yourself (with your own user name):



- (2) Then click on <Change role> at the top of the screen and select the radiobutton representing the relevant role (ECAS user), the virtual entity or directly to the profile who gave delegation to the virtual entity whom the profile is part of, clicking on the corresponding link



- (3) Both your own name, the name of the virtual entity and the profile of the virtual entity appear in the identification field at the top of the screen.



From this point on, you have been authenticated as the virtual entity. You can access the **Tasks** menu pertaining to the virtual entity in question. You can now perform certain actions, determined by the profile or virtual entity. A single user can have different profiles depending the role he's using, his own or a virtual entity one.

16.2.2. Creating a document

- (1) If a virtual entity creates a document, the name that appears in the *Creator* field for the document will be the name of the user who logged in (i.e. the ECAS user). However, the system will also state that the document was created 'on behalf of' the relevant virtual entity.
- (2) In our example, then, you can see that the document was created by *KACI Emilie* on behalf of the virtual entity *ve_dmo* and that it was registered by *KACI Emilie* on behalf of the virtual entity *ve_dmo*.

Document	Classement	Attribution	e-Signataire	Lien
Identification				
N° d'enregistrement : Ares(2010)611		N° de sauvegarde : digit.b.4(2010)1390		Date d'enregistrement : 27/04/2010
Titre : nouvelles règles de sortie des bâtiments journée				
	Actions	Nom du fichier	Date	Lang.
		courrier creme jour IP.doc (Version non modifiable)	27/04/2010	Non spécifié
I/E	Expédié par	Service/Organisme	I/E	TO/CC
I	KACI Emilie	(DIGIT.B.1.001)	E	TO
			Destiné	
			RACHLEVICIENE A	
Type de courrier : Sortant		Date du document : 27/04/2010		
Date de création : 27/04/2010		Date d'envoi : 27/04/2010		
Créateur : KACI Emilie		Au nom de : ve_dmo_grp		
Auteur d'enregistrement : KACI Emilie		Au nom de : ve_dmo_grp		
Niveau de sensibilité : Normal		Timbre :		
Document encrypté : Non		Date d'exp du timbre :		
Date d'exp de l'encryption :		Personne concernée :		
Commentaires :				

In this way, it is possible to see which user actually created the document for the virtual entity.

16.2.3. Performing a task

- (1) If a virtual entity performs one of its tasks, it is the ECAS user (and not the name of the virtual entity) who is identified as the person to have actually read and closed the task.
- (2) In our example, you will see that the first task has been assigned to the virtual entity *ve_HAN-Team*, that it was read by *KACI Emilie* (on behalf of the virtual entity) and closed by *KACI Emilie* (on behalf of the virtual entity). The second task has been assigned to the virtual entity *ve_e-domec*, read by *CERRO Jesus* (on behalf of the virtual entity) and closed by *CERRO Jesus* (on behalf of the virtual entity). The third task has been

assigned to *SCOTTINI Monique*.

Welcome ve_digit (cerroje) , Profile : Base

Document Filing Assignment **e-Signatory** Link

Identification

Save number : digit.b.4(2008)1461
Title : pour capture

Actions	Attachment name	Date	Lang.	External ref.	Owner	Pg.	Support
	ares.css	04/08/2008	Unspecified		willajh		Native elec.

Edit E-Signatory Save E-Signatory Cancel Modification

Actors

Action code	Last Name - First Name	Organisation / Service	Deadline	Critical	Read on	by	Closed on	by
CF CAB	ve_tup	DIGIT.B.4	18/08/2008	1	04/08/2008	KACI Emil	04/08/2008	KACI Emil
CF CAB	ve_digit	DIGIT.B.4	18/08/2008	2	04/08/2008	CERRO GIN	04/08/2008	CERRO GIN
CF CAB	SCOTTINI-TRUSSART Monique	SG.B.1	18/08/2008	3	04/08/2008	SCOTTINI-		

New Answer Copy Print Send link

- (3) If you pass with your mouse on 'Read on' , 'Closed on' and 'by', you will have additional info like the exact time.

16.3. Delegating your profile to another user: creating a document and performing a task on behalf of someone else (scenario 2)

16.3.1. Delegating your profile

- (1) To delegate your entire profile to another user, click on *Preferences* and go to the *User delegation* tab to specify your delegation options.
- (2) In our example, you can see that *GODMAN Toby* is delegating his profile to *KACI Emilie* from 23rd july 2009 to 23rd december 2009.

Main **User Delegation** Task Delegation NOTIS

User Delegation

KACI Emilie DIGIT.B.1.001 X From 23/07/2009 To 23/12/2009 Permissions Remove

From To Permissions Remove

Save



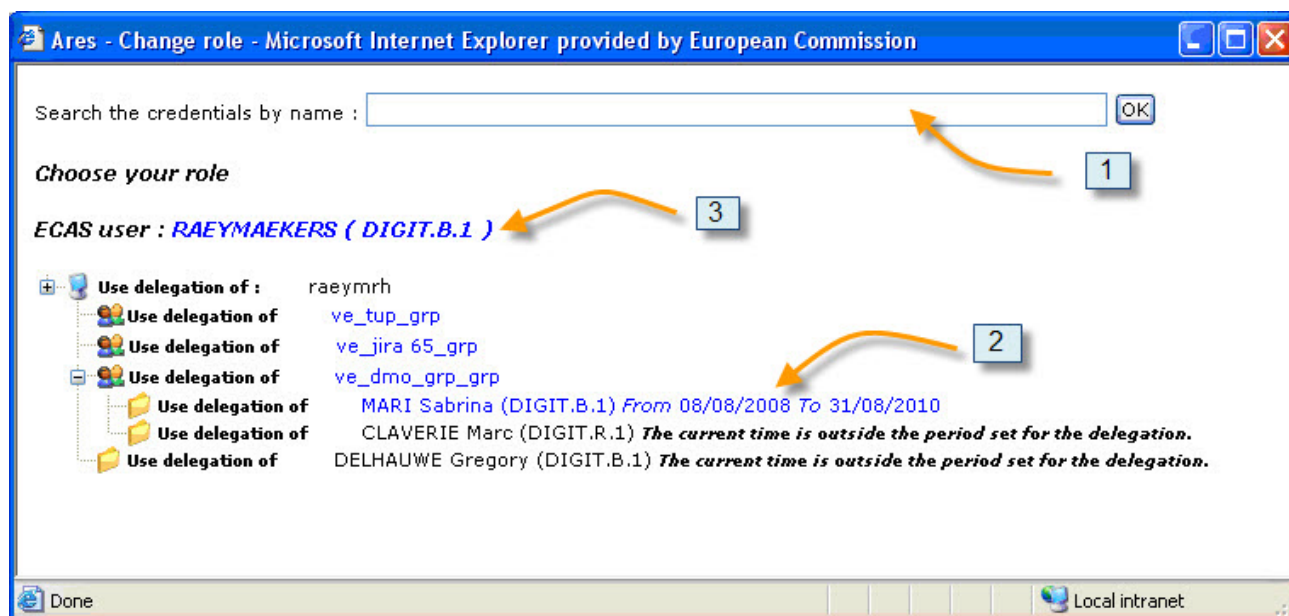
Please note that this action does NOT transfer a person's actual tasks to another person – it means that the delegate can assume the original person's profile. The delegator can continue to perform his tasks.

16.3.2. Logging on

- (1) Even if you have been delegated another person's profile, you first of all log on as yourself (with your own user name).

- (2) Then click on <Change role> at the top of the screen and choose the relevant delegated profile. In our example, you will take the delegation for *VEKEMANS Nicolas*:

16.4. About the function Change Role



Once you click on <Change Role> you have two possibilities:

- Type the beginning of the delegated name and click on OK to be **directly** connected to the profile (**option 1**)
- Click directly on the delegation you want (**option 2**)

This means that you can **change profile directly** without going through all intermediate virtual entity.

Example: in the screenshot Mr Raeymaekers **can directly connect** with Mari Sabrina profile without connecting first with the virtual entity *ve_dmo_grp_grp*.

(This is not possible if Mari Sabrina doesn't give a delegation to the virtual entity *ve_dmo_grp_grp*)

Finally if Mr Raeymaekers needs to execute a task assigned to 've_tup_grp' , doesn't need to return to his main role, he can directly connect to *ve_tup_grp*.

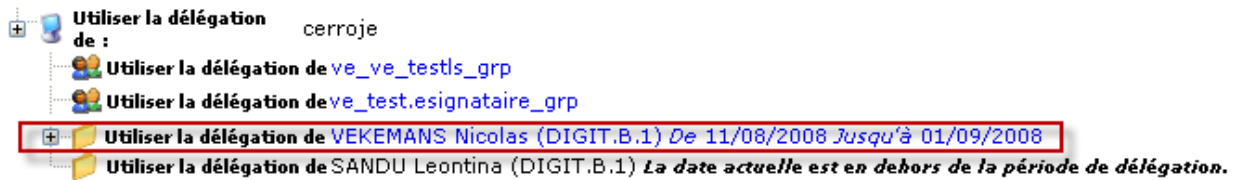
Once you finished your task, to come back to your main role click on the name next to ECAS user (**option 3**)

- (1) In our example we are going to take the delegation of *VEKEMANS Nicolas* (just clicking on the link

Recherche :

Choisir le rôle

ECAS Utilisateur : CERRO GINES (DIGIT.B.1)



- (2) The name of the virtual entity and your ECAS user name, as well as the profile of the virtual entity appear in the identification field at the top of the screen. From this point on, you have been authenticated in the role of the delegator. You can access his **Tasks** menu. You can now perform certain actions, as determined by his profile.



- (3) In our example, *GODMAN Toby* will assume the profile of *KACI Emilie* and perform actions on her behalf.

16.4.1. Creating a document

- (1) If a user creates a document on behalf of another person, the name that appears in the *Creator* field for the document will be the name of the user who logged in (i.e. the ECAS user). However, the system will also state that the document was created 'on behalf of' the person who delegated the profile.
- (2) In our example, then, you can see that the document was created by *GODMAN Toby* on behalf of user *KACI Emilie* and that it was registered by *GODMAN Toby* on behalf of user *KACI Emilie*.

Document	Filing	Assignment	e-Signatory	Link
Identification				
Registration number : Ares(2008)2181		Save number : digit.b.4(2008)4013		Registration date : 28/07/2008
Title : Sample for User Manual 1				
		Attachment name	Date	Lang.
		ARES Manual	28/07/2008	English
				External ref.
				Owner
				Pg.
				Support
				Ares scanned
I/E	Send by	Service/Organism	I/E	TO/CC
I	SCOTTINI-TRUSSART Monique	(SG.B.1)	I	TO
				Received by
				Service/Organism
				RUIZ DE LA TORRE Rafael
				(DIGIT.B.1)
Mail type : Internal Received date : Creation date : 28/07/2008 Creator : GODMAN Toby (DIGIT.B.1) Register author : GODMAN Toby (DIGIT.B.1) Classification : Normal Comments :				
Document date : 28/07/2008 Sent date : On behalf of : KACI Emilie (DIGIT.B.1) Marking : Marking Expiration Date :				

In this way, it is possible to see which user actually created the document on behalf of another person.

16.4.2. Performing a task

- (1) If a user performs one of his tasks on behalf of another person, it is the ECAS user (and not the name of the delegator) who is identified as the person to have actually read and closed the task.
- (2) In our example, you will see that the first task has been assigned to user *KACI Emilie*, that it was read by *GODMAN Toby* (on behalf of the delegator) and closed by *GODMAN Toby* (on behalf of the delegator).

Document Filing Assignment **e-Signatory** Link*

Identification

Registration number : Ares(2008)1445 Save number : digit.b.4(2008)2883 Registration date : 16/06/2008
 Title : Answer to Christine Banking Business Licence of EFG Eurobank

Actions	Attachment name	Date	Lang.	External ref.	Owner	Pg.	Support
	answer to your letter.doc	16/06/2008	English		hasuperu		Native elec.
	Answer to the ares letter	16/06/2008	English		hasuperu		Ares scanned

Edit E-Signatory Save E-Signatory Cancel Modification

Actors

Action code	Last Name - First Name	Organisation / Service	Deadline	Critical	Read on	by	Closed on	by
EMET	KACI Emilie	DIGIT.B.1	30/06/2008 1	<input type="checkbox"/>	28/07/2008	GODMAN To	28/07/2008	GODMAN To
VISA	GARCIA BURGUES Julio	ENV.A.2	30/06/2008 2	<input type="checkbox"/>				
SIGNAT	CARL Mogens Peter	ENV.DG	30/06/2008 3	<input type="checkbox"/>				
RET	KACI Emilie	DIGIT.B.1	30/06/2008 4	<input type="checkbox"/>				

When you are connected through someone's delegation, the number of tasks on the left menu does not take into account the delegation preferences. Indeed the displayed number may be 15 but when you click to visualize the tasks you only see 5 tasks. (You then have to check the delegation preferences of the delegator).

16.5. Delegating your profile to a virtual entity: creating a document and performing a task on behalf of it (scenario 3)

16.5.1. Delegating your profile

- (1) To delegate your entire profile to a virtual entity, click on *Preferences* and go to the *Delegation* tab page to specify that you want to delegate your tasks management.
- (2) In our example, you can see that *GODMAN Toby* is delegating his profile to the virtual entity *ve_support_ares* from 28 to 31 July 2008.

Welcome GODMAN Toby (godmato) , Profile : DMO

Main **Delegation**

Inbox delegation Options

Delegate:

Period of delegation: From * To *

Responsibility delegation: ☐

Automatic tasks delegation

Action code	Delegate	Until	Resp. Deleg.	Actions
CF (A)	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	

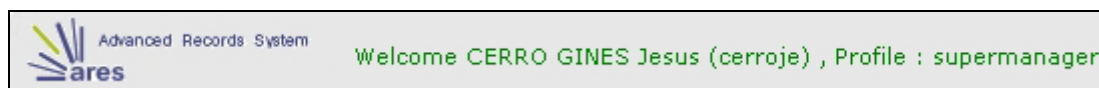
Save

Please note that this action does NOT transfer a person's tasks to the virtual entity –

but it means that the virtual entity can assume the original person's profile. The delegator can continue to perform his tasks.

16.5.2. Logging on

- (1) Even if you are acting as a delegated virtual entity, you must first of all log on as yourself (with your own user name).

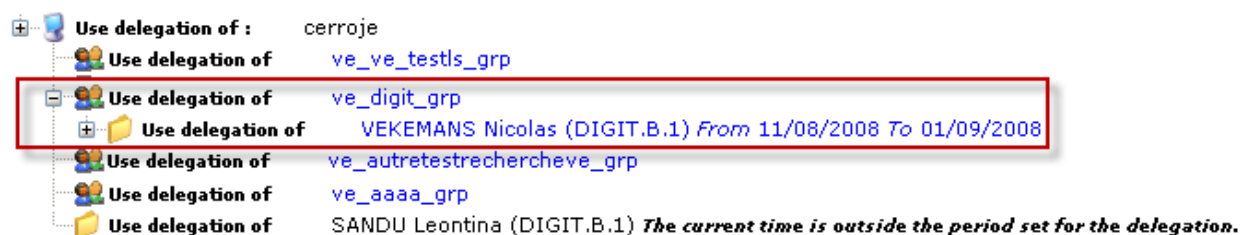


- (2) Then click on <Change role> at the top of the screen and select the radiobutton representing the relevant role : his own role or directly to the profile who gave delegation to the virtual entity whom the profile is part of, clicking on the corresponding link:

Search the credentials by name :

Choose your role

ECAS user : **CERRO GINES (DIGIT.B.1)**



- (3) The name of the delegator and your ECAS user name, as well as the profile of the delegator appear in the identification field at the top of the screen.



- (4) In our example, *CERRO Jesus* assumes the profile of *VEKEMANS Nicolas* (via a virtual entity) and will perform actions on his behalf.

16.5.3. Creating a document

- (1) If a user creates a document on behalf of another person, the name that appears in the *Creator* field for the document will be the name of the user who logged in (i.e. the ECAS user). However, the system will also state that the document was created 'on behalf of' the person who delegated the profile.
- (2) In our example, then, you can see that the document was created and registered by *TANGHE Gabriel* on behalf of *SANDU Leontina*.

Document | Filing | Assignment | e-Signatory | Link

Identification

Registration number : Ares(2012)126 Save number : digit.b.1.001(2012)223 Registration date : 24/01/2012

Title : En réponse à votre demande d'intervention dans les frais de transport

Type	Ares	Native	Lang.	External ref.	Size	Pages
Main document			NS		0.14 MB	1

Doc Actions

- Copy
- Answer
- Modify special
- Print
- Send link
- Add translation
- Manage procedure

I/E	Sent by	Service/Organisation	I/E	TO/CC	Received by	Service/Organisation
I	SANDU Leontina	(DIGIT.B.1.001)	I	TO	KACI Emilie	(DIGIT.B.1.001)

Mail type : Internal Document date : 24/01/2012

Creation date : 24/01/2012 Sent date : 24/01/2012

Creator : TANGHE Gabriel On behalf of : SANDU Leontina

Register author : TANGHE Gabriel On behalf of : SANDU Leontina

Level of sensitivity : Normal Marking :

Document encrypted : No Marking Expiration Date :

Encryption Expiration Date : Person concerned :

Comments :

Signed by :

In this way, it is possible to see which user actually created the document on behalf of another person.

16.5.4. Performing a task

- (1) If a user performs one of his tasks on behalf of another person, it is the ECAS user (and not the name of the delegator) who is identified as the person to have actually read and closed the task.
- (2) In our example, you will see that the task was closed by *TANGHE Gabriel* on behalf of *SANDU Leontina*.

Actors

Add Assignments

My DG

Code	Assigned to	Deadline	Assigned by	Status
CF	KAKURU RADHA Madhava (DIGIT.B.1.001)		KAKURU RADHA Madhava	Completed on 26/01/2012 by KAKURU RADHA Madhava
ASOC	SANDU Leontina (DIGIT.B.1.001)		KAKURU RADHA Madhava	Completed on 06/02/2012 by TANGHE Gabriel



When you are connected through someone's delegation, the number of tasks on the left menu does not take into account the delegation preferences. Indeed the displayed number may be 15 but when you click to visualize the tasks you only see 5 tasks. (You then have to check the delegation preferences of the delegator).

17. MODULE 17: SEARCH METHODS

Context

This important functionality in Ares enables you to find documents, tasks and the contents of files on the basis of any piece of metadata.

Note that only documents which you are authorised to access to will appear in the search results (i.e. the documents where you are a stakeholder and/or a file reader). The results of such searches cannot be compared to the results available in DMO reports.

Several search methods are available in ARES: full text search and metadata search. As a general rule, use Full Text or Metadata Search separately when possible. Indeed the system will always take into account all entered criteria at the same time. So, full Text search expression is executed first and afterwards the metadata expression. It can take a long time if the Full Text criteria are not selective enough!

Please choose unique information: facilitate the Search by using specific words/key words and expressions. Avoid unclear or non-specific criteria such as 'commission', 'invoice' or 'meeting minutes' that are commonly used in Ares.

17.1. Search screen

The search screen is divided into 3 parts:

The screenshot displays the Ares search interface, which is divided into three main panels:

- "Search criteria" panel:** This panel on the left contains various search filters. It includes a "Full text search" section with a text input field containing "archives historiques". Below this are sections for "Documents", "Stakeholders" (with a role dropdown), "Dates" (with a date dropdown), "Associated files" (with a title and specific code input), and "Partitions" (with a search in dropdown set to "ARES"). A "Search" button and a "Reset" button are at the bottom of this panel.
- "Search results" panel:** This panel on the right displays the search results. It shows a table with columns for "Title", "Identifiers", and "Reg. date". The table lists several results, including "Projet Modalités d'application Tri et transfert aux archives historiques de la Commission" and "Archives historiques".
- "Search favourites" panel:** This panel at the bottom left shows a list of favourite searches. It includes a table with columns for "Title" and "Created", showing a search titled "réunion suivi HAN" created on 19/04/2012 11:47.

Left panels are static; the right panel is updated according to the instructions specified in the 'search criteria panel'.

There are two display modes for the search criteria panel: 'simple' and 'advanced' modes. The 'advanced mode' is an extension of the 'simple mode'. It allows you to use additional criteria and operators. The advanced mode applies to full text search, documents and associated files boxes.

Click <'Advanced> button (located at the top right of the search criteria panel) to access 'advanced mode' (Click <Simple> then to switch to 'simple mode' again).

Search criteria

Search

Simple

Full text search

Text

☐ Exact sentence

☒ All words

☐ At least one word

Exclude metadata search (content only) ☐

Documents

Title

contains

Identifier

Procedure

Attachment name

contains

Lvl. of sensitivity

Marking

Encryption

Stakeholders

Role

Dates

Date

Associated files

Title

contains

Specific code

contains

Lead departm.

starts with

Partitions

Search in

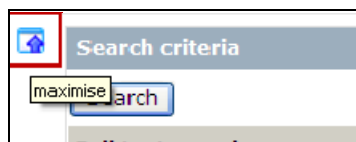
☒ ARES

The searched document must comply with all the encoded criteria and you must have access to it.

Search

Reset

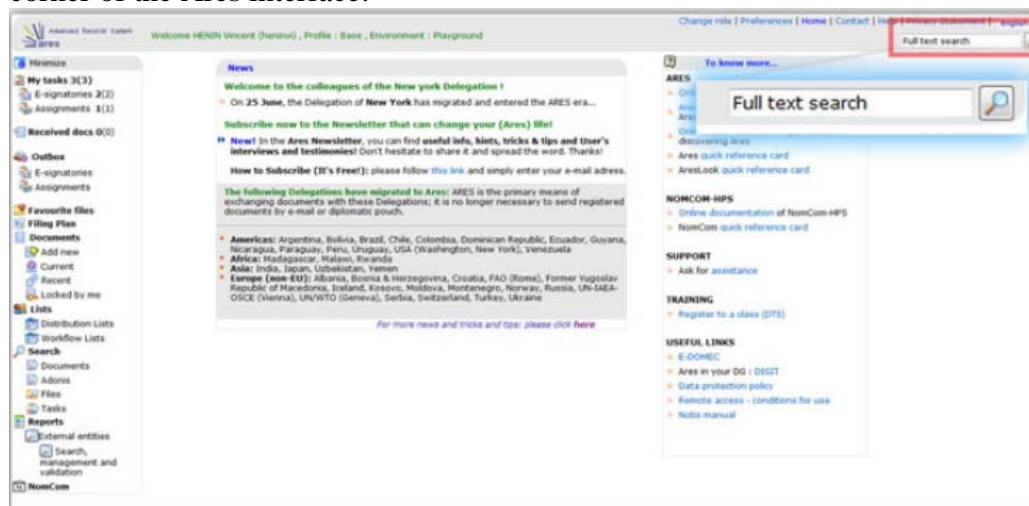
When you launch a search, main left navigation menu is automatically hidden. Please click on <Maximise> button to make it visible again.



17.2. Full text search

The word(s) or the expression will be searched both in the details of the document (title, comments field, numbers, etc.) and inside the body text of the attachment(s) joined to the Ares document.

Quick Search: shortcut for the Full Text Search. The Quick Search field is in the right top corner of the Ares interface:



Full Text Search, accessible via the *Search/ Documents* link in the Ares Left Menu, works according to the same principle but offers more options (upon clicking on Simple/Advanced button):

17.2.1. Advanced full text search:

Exact sentence	Sentence must be found as it is in the document (exact sequence of words, including spaces).
All words (default option)	Only documents containing each of the words (anywhere, even separately, in any order) will be found.
At least one word	Documents containing any one of the words are found.

- **title:** the drop-down menu (*'contains, is, is not, starts with, ends with*) helps you refine your search.

Contains	Contains the sentence, the word or the string of characters
Is	Equals the sentence, the word or the exact string of characters
Is not	Different from the sentence, the word or the exact string of characters
Starts with	Starts with the sentence, the word or the exact string of characters
Ends with	Ends with the sentence, the word or the exact string of characters

17.2.2. Tips when using full text search

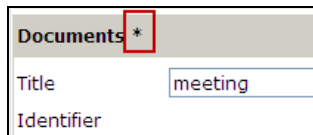
- Enter key words, significant long expressions. This search will look for characters/ words in the contents of documents' attachments . The system recognizes all official languages (at least the three working languages of the Commission) and the orthographic signs with grammar exceptions, plural/singular words and diacritic signs (for example the accents in French).
- Avoid stop words and function words (ex: a, about, that, where, on, in...) when performing Full Text search, unless you do an exact phrase search. Stop words and function words appear in many documents and may impair search result. There are tools in place to filter them out but it is a good practice to avoid them. For example:
instead of 'study on mobility developments in school education in 2012' use 'study mobility development education 2012'.
- Use full words: avoid fragments of words in Full Text:
So if you search for 'comm', it will not match 'commission'.
- Do not use wilcards (% , _) with full text search, use rather them in metadata search.
- Use this search if you know words and/or expressions that can be found in attachments content.

17.3. Metadata search

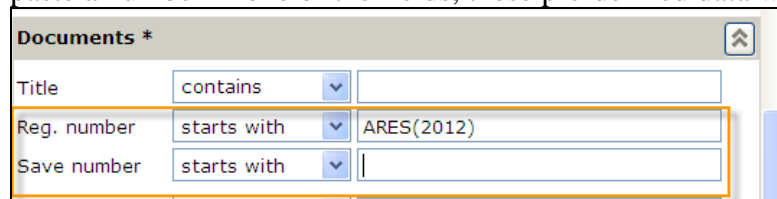
'Classic' search with criteria such as the title, the dates, the different actors (To, Cc persons, assignees and signatories, etc.). They are actually all the fields you can find in the creation form of a document and in the different tabs (assignments, e-signatory, filing) of Ares documents.

17.3.1. Metadata search: simple search

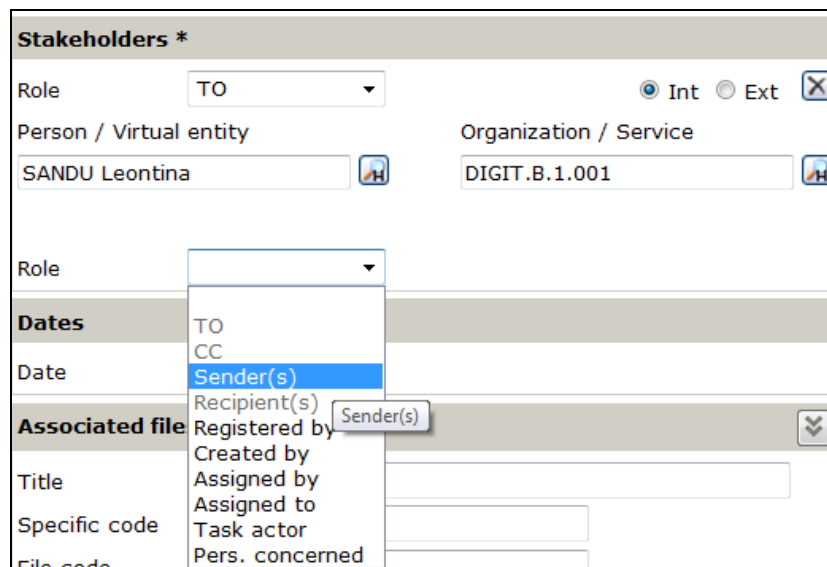
The 'simple search mode' displays a minimum number of criteria in each thematic sub box; these are the most commonly used criteria in an Ares search, i.e. covering almost 80 % of the average Ares searches. This mode is displayed by default when you open the search screen. Each search box gathers criteria about a specific type of information. An asterisk appears on the screen as soon you have entered at least one criterion on a field:



- **Documents:** structured data describing the document or identifying it uniquely. You can for example search specifically on the 'title' or perform a search on number elements ('identifier'). Please note that when you click in one of these fields, they are automatically filled with 'Ares followed by the current year for registered documents, or your service, for saved documents. However, if you paste a number in one of the fields, these pre-defined data will not be added:




- **Stakeholders:** any person/entity directly linked to the document (creator, sender, recipient, person concerned, etc.), including tasks information (assigned by, assigned to, task actor, action codes). To define the stakeholder values, the followings can be used:

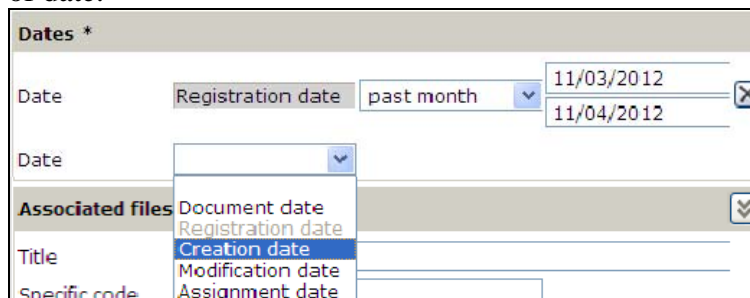


- free-text: type the name and/or the organisation of the entity. The search will be then done on both historical and current databases.

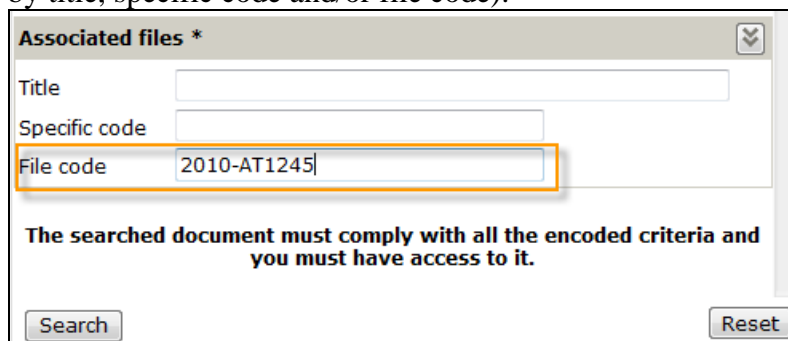
- the autocomplete: please note that it is only available for internal stakeholders. The search is performed on current database (i.e. on the current job assignment of the person) but if you delete manually the service, the search will be done on current and historical databases (on all previous and current job assignments).

- entities search through  that retrieves entries from both historical and current databases.

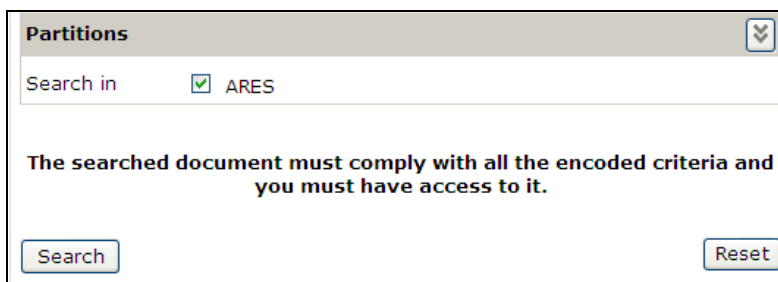
- **Dates:** selection of important document and task related dates. A modifiable default time frame of one month (prior to today's date) is specified for each kind of date.



- **Associated files:** Metadata of files in which documents are filed (you may search by title, specific code and/or file code):



- **Partitions:** applications and repositories where to perform the search. (At the moment only Ares repository is available).



Note

If you search for a registered document with only the 'Registration number' as criterion (combined with the operator 'starts with' or 'is'): if no results are returned, the system automatically performs a second search to check whether the document exists and the user has no access rights on it. The following message is now displayed (even if the document was created by another DG and/or you don't have access to it): 'You do not have access to the document Ares(2012)2898. Please contact the service mentioned in the save number: digit.b.1.001(2012)8240'.

17.3.2. Advanced search mode

The 'advanced mode' is an extension of the 'simple mode'. It allows you to use additional criteria and operators. The advanced mode applies to documents and associated files boxes (and to full text search).

Click <Advanced> button (located at the top right of the search criteria panel) to access 'advanced mode' (Click <Simple> then to switch to 'simple mode' again).

Search criteria

Search

Simple

Full text search

Text

Exact sentence

All words

At least one word

Exclude metadata search (content only) ☐

Documents

Title

contains

Identifier

Procedure

Attachment name

contains

Lvl. of sensitivity

Marking

Encryption

Stakeholders

Role

Dates

Date

Associated files

Title

contains

Specific code

contains

Lead departm.

starts with

Partitions

Search in

☒ ARES

The searched document must comply with all the encoded criteria and you must have access to it.

Search

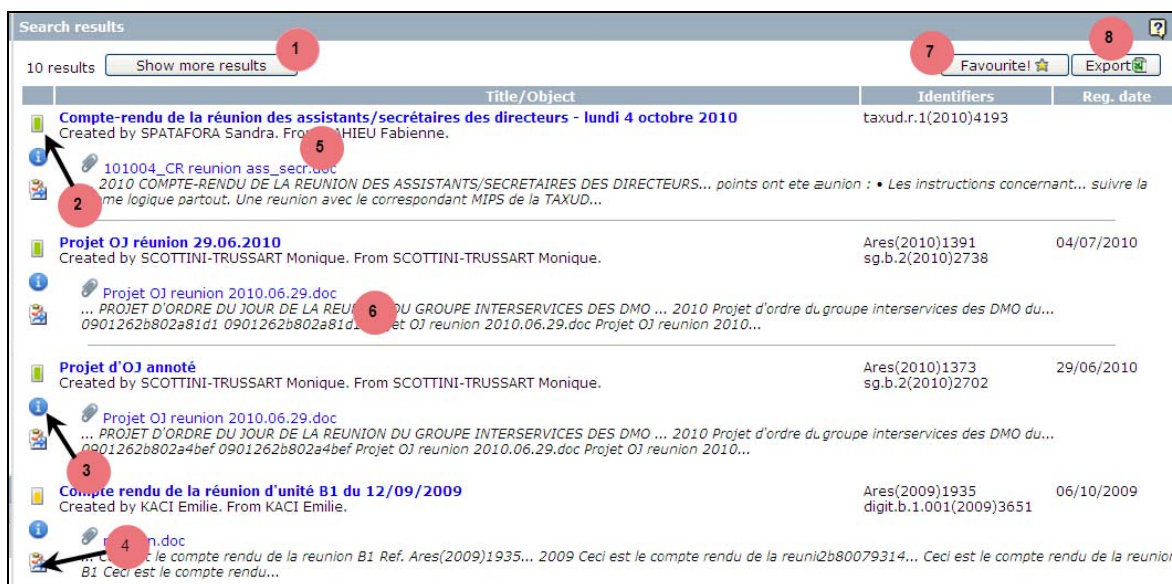
Rese

17.3.3. Tips when using metadata search


- Use Wildcards (%) and (_) in Metadata Search (wildcards do not work with Full Text). '%' replaces several characters; '_' replaces one character. For example:
 %pro% → 'programm', 'project', 'reproduction' and 'procedure'...
 'co_e' → 'code' and 'core'.

- Pay attention to accents; they do matter in Metadata Search: 'école' will not match 'ecole' but it does in Full Text Search. Therefore, use Full Text Search if you are not sure whether a word is spelled with an accent or not.
- Use Save Number and 'starts with' operator to filter by the DG creator of the document: when clicking with your mouse in the Save Number field, your service automatically appears (dg.service.unit). Use this to also filter documents created by other dg's: type manually the service creator.
- Use 'contains' operator with incomplete document numbers: use 'is' operator only when searching for a document number if you have the complete number! Use 'contains' operator when you don't.
- Avoid searching with words in the title with 'ends with' and 'contains' operators in Advanced mode. It usually ends in a time out response. Examples:
title CONTAINS 'egypt' → 65 secs (time out!)
title CONTAINS '316637' → 28 secs
Save Number CONTAINS '1678101' → 5 secs



17.3.4. Search results




- (1) The first 10 results are displayed. If you want to see all results (limited to 300) please click <Show more results> button. The search results are designed to provide a maximum space for the title and the attachments.
- (2) Search results view is by default sorted on the ranking when running a full-text search: the most accurate one comes on top (that cannot be modifiable).

- (3) Click on  icon to provide additional document information:



 icon copies automatically the metadata from your document in the clipboard. You may paste these contents. (Click  to close the pop-up).

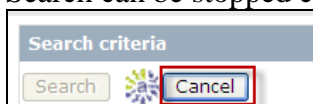
- (4) Clicking on the tasks icon  leads to the document assignment tasks.
- (5) Clicking on the title of the document title leads to the document details.
- (6) When information is found in the contents, the attachment is displayed.
- (7) When you click on <Favourites !> button, the system asks for a name and creates a new entry in the 'favourites' part (see next chapter).
- (8) The export function exports the main fields in an xls file.

Notes

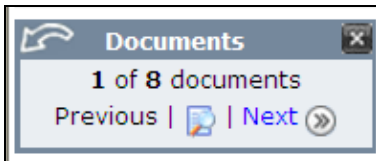
- Search time-out is set to 2 minutes. When this deadline is met, a warning message is displayed and the search is stopped.






- Search can be stopped clicking on <Cancel> button:

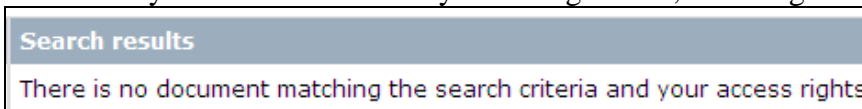



- The <Reset> button erases all criteria to do a new search.
- You can navigate among your search results: when you click on an element for example in the **Tasks** menu a new window is displayed on top left of the screen, you can navigate to the previous and next document.



If you click on  or  you can display the previous and next element, if you click in the middle icon you go back to the list of elements. (Be careful: navigating in a document out of your results or clicking in the left menu removes the navigation tool and prevents you from going back to the results list).

- Remember: the more search criteria you specify, the fewer results will appear. However, they will match your criteria better.
-  If the system does not find any matching results, a message to this effect is issued.



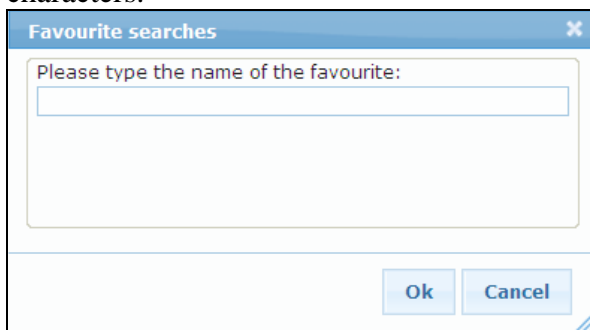
- The  icon in front of a document means that access to it is restricted to a sensitivity level other than 'Normal'. However, you still have access the document.

17.3.5. Search favourites

Ares now gives you the possibility to save specific search criteria: a 'favourite' mix of criteria that will enable you to re-launch this search in another Ares session.

- **Adding a new favourite**

- (1) To save a favourite, click <Favourites> button in the search results screen.
- (2) Type the title for the new favourite. This title should be unique and should not exceed 100 characters.





- (3) Press <OK>.
- (4) Your new favourite is put at the bottom of the search screen. To re-use it for another future search, simply click on its name.

Favourite searches		
Title	Created	
 réunion suivi HAN	19/04/2012 11:47	

- **Managing favourites**

The favourite panel contains searches of the user. Each favourite contains the criteria with their associated values and search operators.

- (1) To change the title of a favourite, click  and type the new title.
- (2) To delete a favourite, click .

See also

Adonis/Ares


Tasks

Files

17.4. Adonis/Ares search

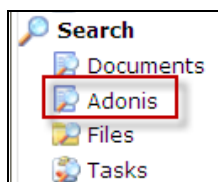
Context

The Adonis search allows you to search for documents registered in Adonis (the document management system used before Ares was introduced).

 Before you can use this functionality, you must specify your Adonis preferences. For more information on how to do this see: [Preferences](#).

Method

- (1) Adonis search is available separately under '*Search*' menu.



- (2) Specify the necessary options and click <Search>:

Adonis

Subject:

Encoding date: To

Reference of sender:

Heading:

Files:

Status:

Service: Year: Type: Number:

Register:

Folder:

Sender:

Recipient:

Assigned to:

- (3) Results are displayed. Click on a title to open the details of the corresponding document:

Search results							
26 item(s) found, displaying 1 to 20. Page(s): 1, 2. Item(s) per page: 20 Show all							
Title	Date of document	Encoding date	Registration reference	Filing reference	Sender	Attachment(s)	
APPOINTMENT OF EVALUATION COMMITTEE FOR THE MARKET DIGIT/R2/NP/2006/121-MS FOR PROVISION OF MICROSOFT LICENSES AND RELATED SERVICES	11/01/2007	11/01/2007	DIGIT/R/2(2007) D/165...		PELTGEN FRANCIS (DIGIT/R/2)	1	
BRIEFING ON A NEGOTIATED PROCEDURE WITH MICROSOFT SA- BELGIUM- MARKET ADMIN/DI2/PN/2003/208 - FRAMEWORK CONTRACT FOR HIGH-LEVEL SERVICES.	09/02/2004	09/02/2004	DI2(04)D/3299...	DI2(04) D/3299...	PELTGEN FRANCIS (DI2)	2	
CONTRAT DI/01116 DU 12/08/1999 POUR L'ACQUISITION DE LOGICIELS MICROSOFT. ENTERPRISE AGREEMENT : DECLARATION ANNUELLE (Lien vers ADMIN : EX-DI7 - 2002 - D- 42373)	26/08/2003	28/08/2003	DI2(03)D/20892...	DI2(03) D/20892...	PELTGEN FRANCIS (DI2)	1	
CONTRAT DI/01116 DU 12/08/1999 POUR L'ACQUISITION DE LOGICIELS MICROSOFT. ENTERPRISE AGREEMENT : MAINTENANCE EN 2003 DES LICENCES OFFICE ACQUISES ENTRE LE 01/07/2002 ET LE 30/06/2003 (Lien vers ADMIN : EX-DI7 - 2002 - D- 56736)	28/08/2003	29/08/2003	DI2(03)D/21072...	DI2(03) D/21072...	PELTGEN FRANCIS (DI2)	1	
CONTRAT DI/01116 DU 12/08/1999 POUR L'ACQUISITION DE LOGICIELS MICROSOFT. ENTERPRISE AGREEMENT : PROLONGATION DE LA MAINTENANCE DES LICENCES OFFICE ACQUISES AU 30/06/2002 (Lien vers ADMIN : EX-DI7 - 2002 - D- 56736)	28/08/2003	29/08/2003	DI2(03)D/21065...	DI2(03) D/21065...	PELTGEN FRANCIS (DI2)	1	
DISTRIBUTION DE LA DÉPENSE LIÉE À L'ENTERPRISE SUBSCRIPTION AGREEMENT SIGNÉ AVEC MICROSOFT (CONTRAT DIGIT-04271-00)	03/02/2005	03/02/2005	DIGIT/R/2(2005) D/403...		PELTGEN FRANCIS (DIGIT/R/2)	1	
DISTRIBUTION DE LA DÉPENSE LIÉE À L'ENTERPRISE SUBSCRIPTION AGREEMENT SIGNÉ AVEC MICROSOFT (CONTRAT DIGIT-04271-00)	09/02/2005	08/02/2005	DIGIT/R/2(2005) D/495...		PELTGEN FRANCIS (DIGIT/R/2)	1	
EXPEDIE - NOTE TO INSTITUTIONS: DISTRIBUTION OF MICROSOFT CONTRACTS	04/03/2004	04/03/2004	DI2(2004) D/165...		PELTGEN FRANCIS (DI2)	1	

Note

If you have not yet specified your Adonis settings, the system will ask you to do so when you open the *Adonis* tab page.

See also

Preferences

17.5. Tasks search

Context

The tasks search in Ares enables you to search through tasks in workflows ('*Assignment*' or '*e-Signatory*') which you are authorised to access. The search covers all types of tasks: new tasks, closed tasks, future tasks, recent tasks and finished tasks.

Method

- (1) Click on **Tasks** in the **Search** menu.
- (2) Select the '*recipient*' of the task(s) you are looking for from the drop-down list in the *Assigned to* field: *Other DG*, *My DG*, *My unit*, or *Me*.

- (3) You can also select the user who assigned the task from the down-down list in the *Assigned by* field (the options are: *Other DG*, *My DG*, *My unit*, or *Me*).
- (4) You can refine your search by specifying various dates:
 - a. From the drop-down list, specify the appropriate operator ('inferior to' means 'before', 'superior to' means 'after') for the date of your choice (the ***deadline***, ***assignment date***, ***read date***, or ***finished date*** (i.e. date on which task was closed)).
 - b. In the *Date* field, enter the date manually or use the calendar tool.
- (5) When you have specified your criteria, click on <Search> or press [Enter].

Note

The <Reset> pushbutton clears the criteria and results of the previous search so that you can specify data for a new search.

17.6. Files search

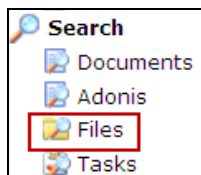
Context

You can run a search for files in Ares by using either a simple search or by navigating in the filing plan. .

Method

17.6.1. Simple search

- (1) Click on **Files** in the **Search** menu.



- (2) This takes you automatically to the **Search** tab page.

A screenshot of a web application interface showing the 'Search' tab. At the top, there are three tabs: 'My favourites files', 'Search' (which is active), and 'Filing Plan'. Below the tabs is a section titled 'Search Criteria'. It contains several input fields: 'Decimalisation' (with a 'Heading' label), 'Specific code' (with a 'Specific code' label), 'Title' (with a 'Title' label), 'File code' (with a 'Files' label), 'Chef de file' (with a value 'DIGIT.B.1.001'), and 'Desk officer'. There are also checkboxes for 'All' and 'Status' (with 'Active' checked and 'Closed' unchecked). At the bottom of the form are two buttons: 'Search' and 'Reset'.

- (3) Enter your search criteria in the relevant fields, and then click on <Search> or press Enter.
 - (a) *Decimalisation*: NOMCOM heading code
 - (b) *DG code*: specific heading code defined by DG (optional). This is the reference code which was given by the DG to headings in the filing plan before the NOMCOM code with its own decimalisation system existed.
 - (c) *Title*: name of the heading
 - (d) *Specific code*: internal code for managing files given by the DG. This code may be a copy of the codes on paper files or part of a file identification system unique to the DG.

- (e) *Chef de file*: the department responsible for the file. (By default, this field contains the name of your department, but you can change it if necessary.) 'Chef de file' metadata does not take into account lower hierarchical services. For example, if you are looking for all files where 'digit.b.' is 'chef de file', the results will only display the files where CF is only 'digit.b'. CF 'digit.b.1', 'digit.b.2', etc. will not be displayed in the results. You can see all files should you tick the adjacent box.
- (f) *File title*: name of the file. The file title itself must be concise, pertinent and understandable (regardless of how easy to read the documents actually filed there are)
- (g) *Status*:
 - *Active*: currently being processes, possibility of filing new documents there
 - *Closed*: processing of this file has been completed and no more documents may be filed here
- (h) *'Desk officer'*: you can search for a file through its desk officer: you have to type here a login
- (i) The <Reset> pushbutton clears the criteria and results of the previous search so that you can specify data for a new search.
- (j) You can see the content of one file, clicking on his 'File title' or his 'Specific Code'

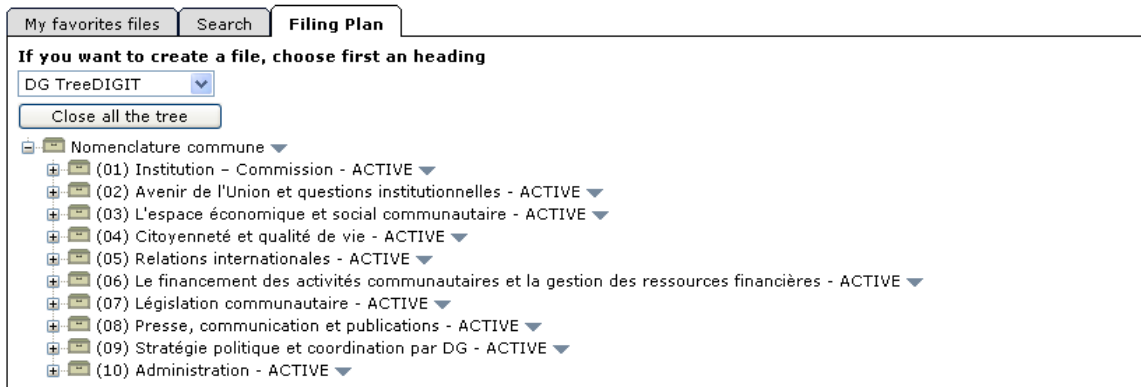
The screenshot shows the DIGIT search interface. At the top, there are tabs for 'My favourites files', 'Search', and 'Filing Plan'. The 'Search' tab is active, displaying 'Search Criteria'. Below this, there are input fields for 'Decimatisation', 'Specific code', and 'Title'. There are also checkboxes for 'Status' (Active and Closed) and a 'Desk officer' field. A 'Search' button and a 'Reset' button are at the bottom of the criteria section. Below the criteria section, there is a 'Search Result' section with a 'File Content' tab. It shows 300 items found, displaying 1 to 10. The results are shown in a table with columns: File code, Specific code, File title, Chef de file, Desk officer, and Status.

File code	Specific code	File title	Chef de file	Desk officer	Status
2008-AC0361-1		dvscsdv	digit.b.1.001		ACTIVE
2009-AD6626	FspeCode	File2 (title in EN)	digit.b.1.001	novakgo	ACTIVE
2009-AD6657		test limited	digit.b.1.001	marisab	ACTIVE

17.6.2. Finding a file in the filing plan

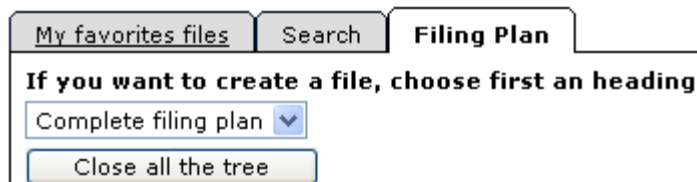
- (1) Click on **Files** in the **Search** menu.

- (2) Click on the *Filing Plan* tab.



- (3) Expand the filing plan tree until you reach the level at which the file or subfile is located.

- (a) In the drop-down list, specify whether you want to view the complete filing plan or just the part of the filing plan that corresponds to your DG.



- (b) You have the option of collapsing the entire filing plan by clicking on <Close all the tree>.

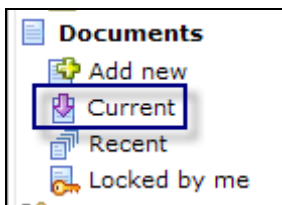
17.7. Finding the current document

Context

During any given session, Ares enables you to access the last document you were working on – whether you have created it, consulted it or been involved in its assignments.


Method

- (1) In the *Documents* menu, click on *Current*.



- (2) The system displays the *Document* tab page of the last document you were working on.

Notes

-  If you start to create a document but then cancel that operation, the document in question will still be opened as the last document you consulted. If you do not confirm your data by saving or registering the document, the metadata will be lost.
- The current document remains buffered for the current session but is not persistent between sessions. In other words, the document is re-initialised every time a new connection is established. That is why Ares displays the search page if you click on **Current** immediately after logging on.

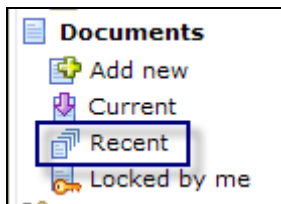
17.8. Finding recent documents

Context









You can display a list of the last thirty documents you have consulted or processed with your user name.

Method

- (1) In the *Documents* menu, click on *Recent*.



- (2) The system displays a list of the last thirty documents you opened:

Recent documents				
	Title/Subject	Save Number	Registration number	Registration date
	En réponse à votre demande d'intervention dans les frais de transport	digit.b.1.001(2012)223	Ares(2012)126	24/01/2012
	Politique d'expansion	digit.b.1.001(2012)183		
	Q10 est bon pour la santé	digit.b.1.001(2011)2961		
	En réponse à votre demande d'intervention dans les frais de transport	digit.b.1.001(2012)199	Ares(2012)125	24/01/2012
	Expansionnisme dans les pays tiers	digit.b.1.001(2012)258		
	Réorganisation de la DG ADMIN au 1er janvier 2010 (Implication de la DG DIGIT)	digit.b.1.001(2010)1184	Ares(2010)506	12/03/2010
	Contracts SocieteX and CE	digit.b.1.001(2010)3515	Ares(2010)1760	22/09/2010
	Expansionnisme dans les pays tiers	digit.b.1.001(2012)255	Ares(2012)147	31/01/2012

The  icon is a tooltip displaying summarised information from the relevant *Document* tab page.

En réponse à votre demande d'intervention

En réponse à votre demande d'intervention dans les frais de transport

Creation date :

Encoding Date :

Registration date : 24/01/2012

Save number : digit.b.1.001(2012)199

Registration number : Ares(2012)125

Comments :

Procedure :


Sender(s) : SANDU Leontina
(DIGIT.B.1.001)

Recipient(s) : MAALOE Sidsel
(DGT.A.DA.01)

Attachment(s) : Doc2.doc

To view all the tab pages of a document, click on the hyperlink in the relevant *Title* column.

Notes

- These documents remain in the memory between sessions.
- The  icon in front of a document means that access to it is restricted to a sensitivity level other than 'Normal'. However, you still have access the document:

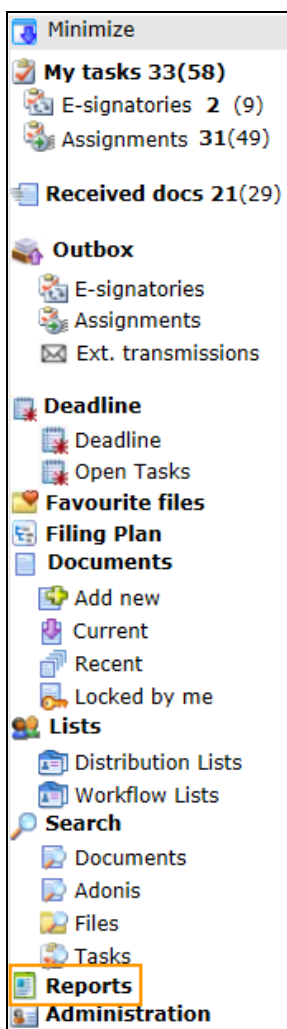
		Commission ARES Training letter - Godman	digit.b.1(2008) 2092	Ares(2008)2183	28/07/2008
-------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------	----------------------------------------------------------	-------------------------	----------------	------------

17.9. Report: documents created by my service, not registered and not filed

You can see the documents that shall be deleted in the coming days/months. As saved unfiled documents are automatically deleted approximately 6 months after their creation, you can anticipate the deletion (the system generates the actual deletion 4 times a year - 1 March, 1 June, 1 September and 1 December - so it could take slightly more than 6 months).

A new column has been added for this purpose: "*Scheduled deletion date*" specifying the exact date of deletion. This report is available to all users, but only the DMO has access to all the documents; all other profiles only see the documents from their service they have access to.

- (1) Please click on the menu '**Reports**' then choose '*Documents created by my service, not registered, not filed (for user)*'



- (2) Select the creation date of documents ('documents older than 0/30/60/90/120 days'.) You can also include only the documents candidates for deletion. If so, 'document older than' option is disabled.

Documents created by my service, not registered, not filed (for user)



Marked for deletion only ☐

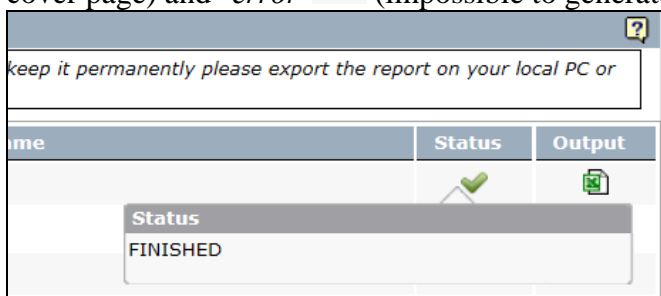
Documents older than



Description

This report selects all documents of my service that are not registered and not filed. The report provides for each document the scheduled date of deletion and the number of days left before then.

- (3) Click <Submit>button.

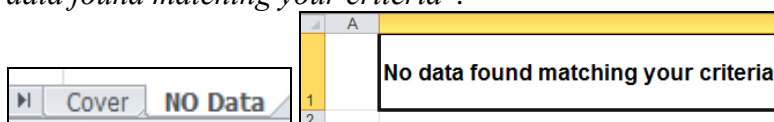
- (4) The report will be displayed at the right of the screen. Several report statuses are available: "finished"  (the report was generated properly, and is available in Excel format), "finished with limitation" (the report was generated but size/time limitations prevent the report from being complete. An explicative warning is also displayed in the cover page) and "error"  (impossible to generate the report)



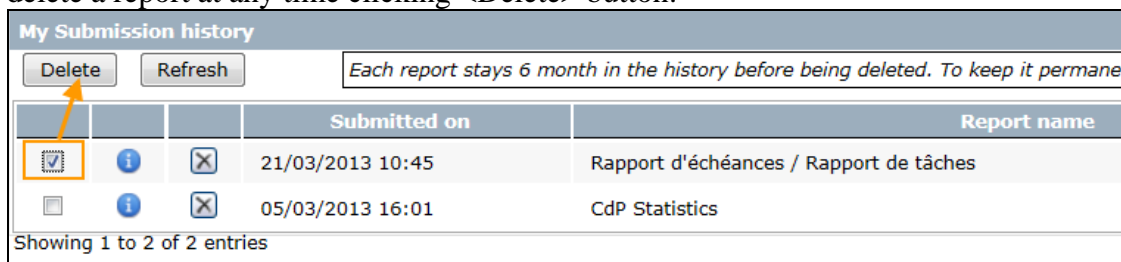
- (5) When the report is done, click  icon to open the report.  icon: the report is being generated, please wait. You can refresh the screen with <Refresh> button at the top of the page.

Notes

- The cover page of the report displays the ID of the report, request date, report name and chosen parameters.
- When an Excel output is empty (ex: because there is no data or when no corresponding document/entity is found...), a warning is displayed in the cover page of the Excel output "No data found matching your criteria":



- All reports are automatically deleted 6 months after their submission date. You can manually delete a report at any time clicking <Delete> button:



- Excel reports: hyperlinks directly pointing to the documents are available in the column showing a document's "save number". (If the report displays both "registration" and "save" numbers, the hyperlink is also on the save number).

18. MODULE 18: REGISTERING EMAILS WITH ARESLOOK

Context

An add-in called *AresLook* allows you to register or save incoming and outgoing e-mails in Outlook. This add-in must be installed on your PC, if decided by your IRM/DMO.

The information contained in the e-mail will be stored as metadata in an Ares document.

The following documentation explains how to use Areslook version 3²⁶. Please pay attention: this new release must be installed in your DG if you want to use it: please contact your DMO about it.

'External transmission' function (explained in the following chapter) is closely linked with Areslook for outgoing mails.



The printscreens were made with Outlook 2010/ Windows 7. If you are working on another version, Areslook buttons may be under Areslook tab or ribbon.



With Areslook 3.0: When sending an email with Areslook 3, there is now a verification of the 'FROM' field when using a Functional mailbox. Which implies:

- Your virtual entity must be linked to the Functional Mailbox in ARES: please insert the alias and the e-mail address in the properties of the virtual entities (see details chapter 20.8)
- You must be a member of this virtual entity.

Please note that, if you send an email on behalf of a colleague, you also need a profile delegation of that colleague in ARES.

(When sending e-mails, the total size of attachments cannot exceed 10 MB).

Method

18.1. Registering an incoming mail

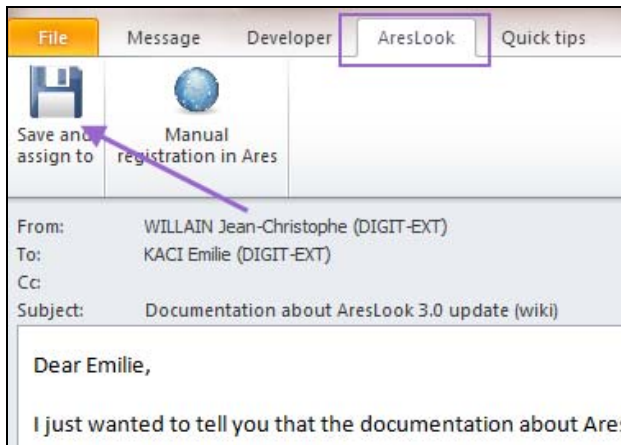
To register an incoming mail with Areslook: you may use a semi-automatic mode which sends a registration E-signatory task to another person ('save and assign to...' option) or a manual mode ('manual registration in Ares'). The tasks generated by Areslook are now called 'A-EXP' and 'A-CLASS'. Sorting of Areslook tasks in the inbox is then easier. ('A-EXP' and 'A-CLASS' naming conventions are simply there in the inbox, for display purposes. Indeed if you open/search for such a task, those are entitled 'EXP' and 'CLASS').

²⁶ Areslook 3 is only compatible with Ares 2.5 onwards.

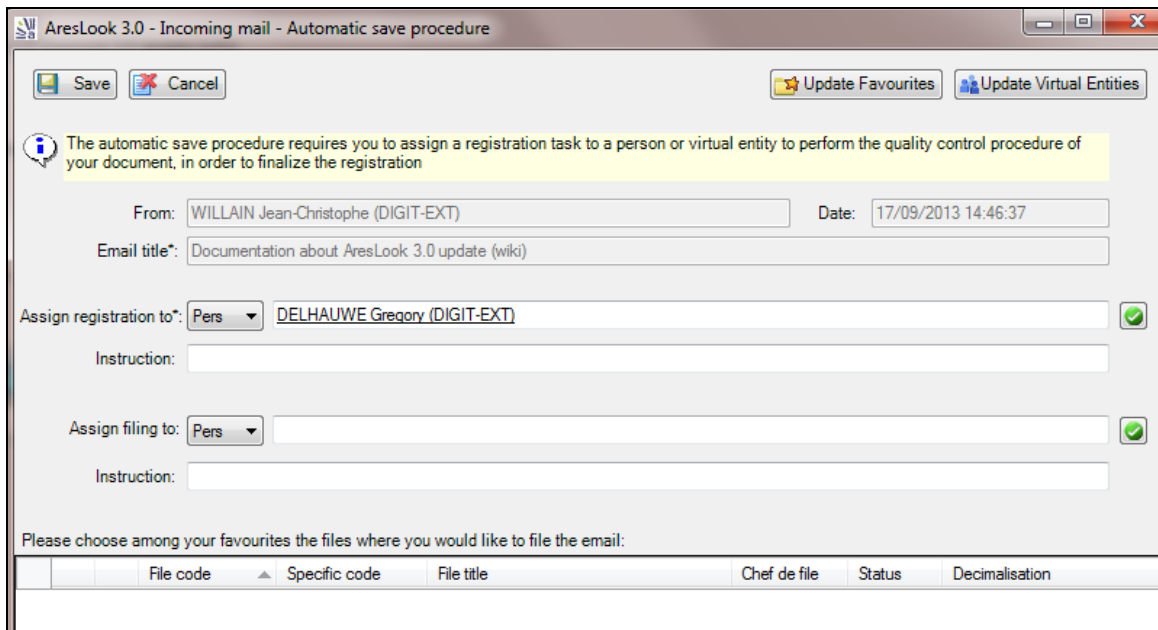
18.1.1. Save and assign to ...

This option automatically saves your document in Ares and sends an E-signatory registration task [with A-EXP code] with comments to another user/virtual entity (or to yourself). The assignee will perform a quality control on the save document and will register it in Ares.



- (1) Open the email you would like to register.
- (2) Click on 'Areslook' tab and choose the first option <Save and assign to>:











- (3) Fill in with the necessary data:



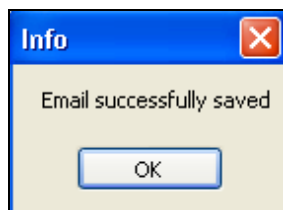
- 'From': Sender of the email (cannot be modified, automatically filled by the system).
- 'Email title': Title of the email (if the email did not contain any title, the field will be greyed for modification). The title will be the **title** of your Ares document.

- 'Date': Date and time of the email.
- 'Assign registration to': Assigns an **E-signatory task (A-EXP) to a person ('pers') or a virtual entity ('VE') for registration** ( **compulsory operation**). Choose 'person' or 'virtual entity', type its first letters (or the complete name) of the entity and click on . Corresponding results are displayed in the drop-down list. Double-click on the entity or select it from the arrows of your keyboard and press [enter]. If you will do the registration yourself, assign a registration task to your name (or your virtual entity).
Note: all Outlook contacts are available in the list. But if you select a person who is working outside of the Commission or a functional mailbox, they will not be accepted by the system.
- You may type 'Instructions'.
- 'Assign filing to': you may also assign a filing task (A-CLASS) to a person or a virtual entity (not compulsory); with or without instructions.
- You may file the document in one of your favourite files*: tick the corresponding file:

Please choose among your favourites the files where you would like to file the email:							
		File code	Specific code	File title	Chef de file	Status	Decimalisation
		2009-AA4642	ICS10 0001	Formation Ares R1	digit.r.1	ACTIVE	11
		2009-AA4642-1	scscs	1000 , datù fñ ràç 'çlé dñvdñf vs(:xc ...	digit.r.1	ACTIVE	11.2009-AA4642
		2009-AA4642-2	Manage the user...	Manage the users of the file (They ca...	digit.b.1.001	ACTIVE	11.2009-AA4642
		2009-AD2233		Concurrence	digit.b.1	ACTIVE	09.01.04

* : if you first have imported them in Ares

- (4) Click on <Save> to confirm (or <Cancel>). You receive a confirmation:



- (5) A corresponding saved document is created in Ares. A registration task is sent to the user you have specified earlier under 'Assign registration task to' field:

Document Filing Assignment e-Signatory Link

Identification

Save number :
digit.b.1.001(2013)1478

Title : Documentation about AresLook 3.0 update (wiki)

Type	Actions	Native	Lang.
Cover note			NS
Cover note			NS

I/E	Sent by	Service/Organisation	I/E	TO/C
I	WILLAIN Jean-Christophe	(DIGIT.B.1.001)	I	TO

Mail type : Internal
Creation date : 17/09/2013
Creator : KACI Emilie

- You are the **creator** of the document.
- **The sender** is inserted, if he is known from the system. If he isn't or if the external entity is not unique, the field will be left. Indeed AresLook uses the **email address** (which should normally be unique) to recognize the entity (it is consequently important the the email addresses be corretly encoded).



AresLook does not create external entities with incoming mail.

- **Recipient(s)**: such as the senders: if the recipients are recognized by Ares, they are correctly put as recipients in the Ares document. If they aren't or not unique, the field is left empty. (Distribution lists are not kept).

- **Conversion:**

- HTML e-mail is converted to **RTF with Microsoft Word**. Embedded objects (such as images) are now kept and the formatting is better preserved
- **The msg file is stored** and **attachments are kept in their native format** (with 'annex' type)

- (6) The user who has received the A-EXP task has then write access to the document. She/he can proceed with the registration (quality check and correction on the document). If some fields were not correctly filled or missing, a warning is displayed and points out the errors.

All my tasks All my e-sign All my assignments Tasks of my roles

Finish | Follow up | Clear follow up | Sort by...

Code	Proc.	Title
A-EXP		Documentation about AresLook 3.0 update (wiki)

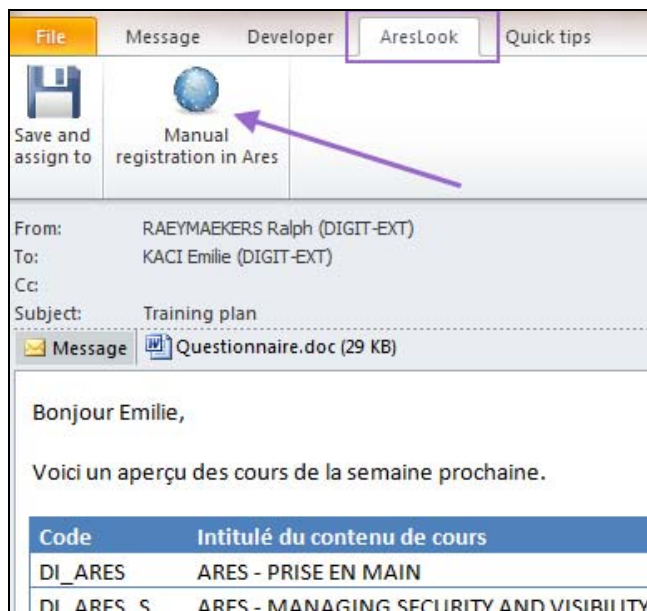
Note

- Next time you will use <Save and assign to...> function, the last name/virtual entity you have used for the registration task will be automatically put by default. (Filing task will be empty).

18.1.2. Registering in manual mode

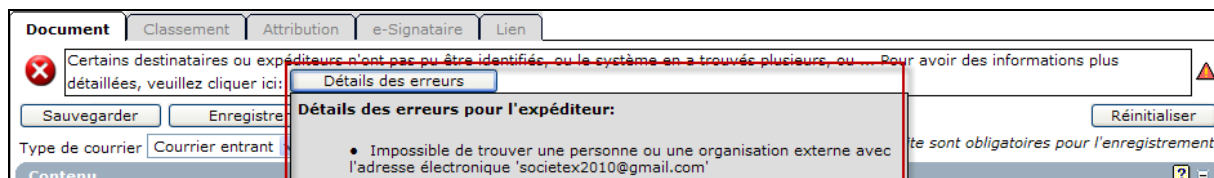
The email metadata are put automatically in an Ares document. You are re-directed to this document, in Ares, to proceed with the save/registration in manual mode.

- (1) Open the email you would like to register.
- (2) Click on <Manual registration in Ares> under 'Areslook' tab.



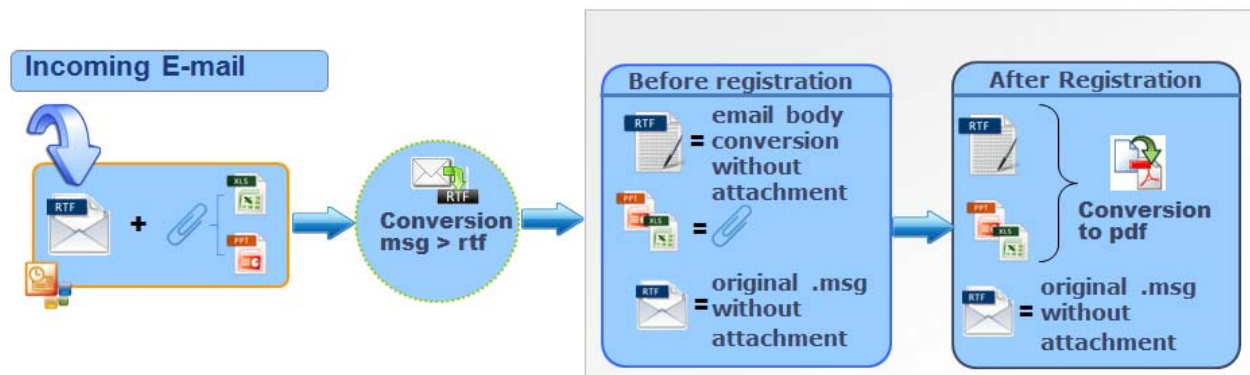
- (3) You are automatically redirected to Ares. If you were not yet connected to Ares, you must beforehand connect yourself with ECAS.
- (4) The email metadata are copied and filled in the document (as done with the automatic <Save and assign to...> procedure).

If some fields are empty or not correctly filled, the system highlights them at the top of the screen (Click on <Error details> to see the information). You must correct the mistakes to be able to continue.



- (5) Please continue the process (save, assignment, filing, registration ...)

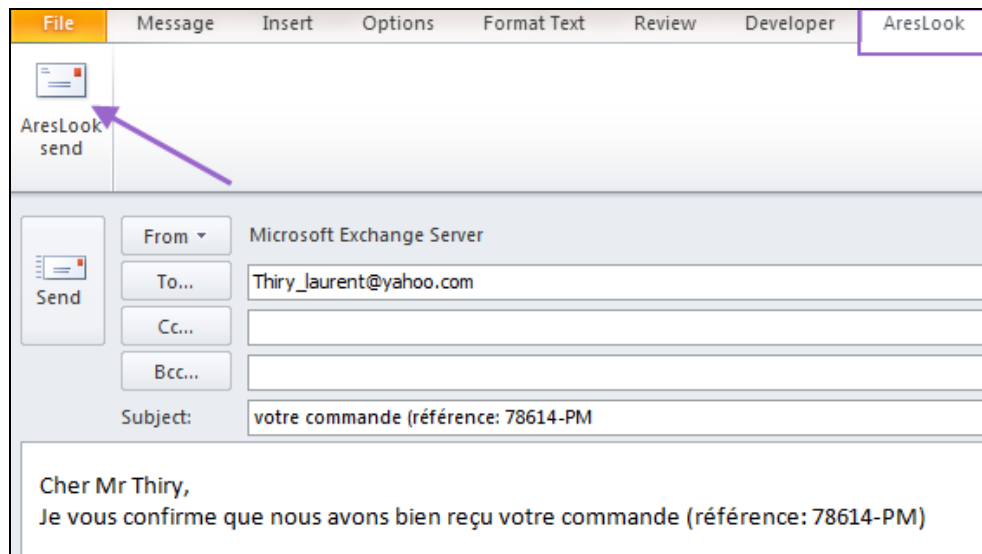
18.1.3. Summary: Areslook incoming e-mail: body and attachments



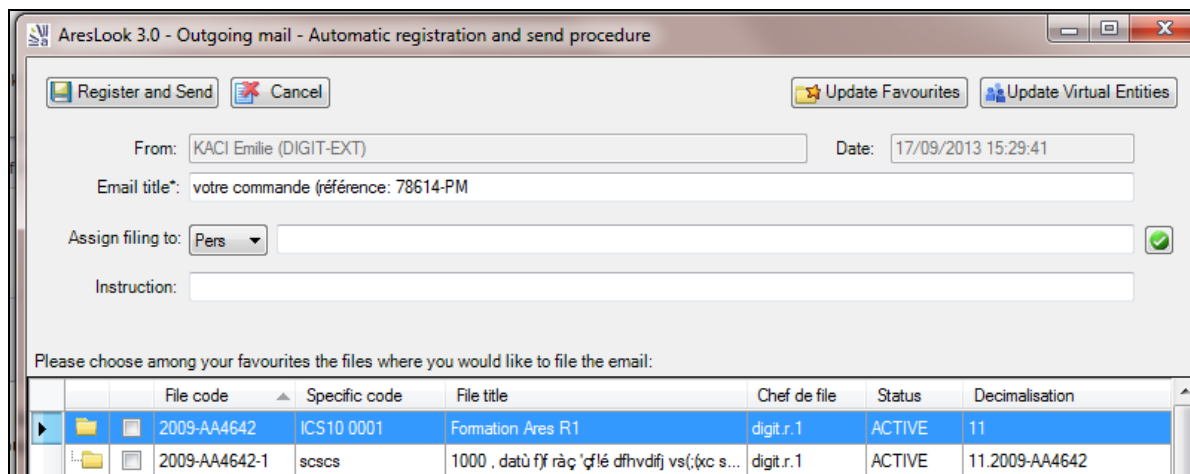
18.2. Registering and sending an outgoing mail

As a general rule for outgoing mails: documents created in Ares are sent out with Ares option '*External transmission*'. Nevertheless, for urgent emails, you may use Outlook and <Areslook Send> option: the **email will be then registered and sent by Ares**.

- (1) When your email is ready to be sent out, click on <**Areslook Send**> under '*Areslook*' tab:



- (2) You may:



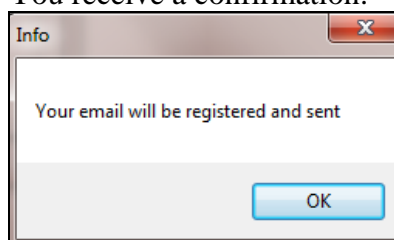
- Modify the **title** of the document that will be created in Ares (so that it be compatible to E-Domec encoding rules).
- **Put a filing task** with instructions to a person or a virtual entity*.
- **File** the document in one of your favourite files: tick the corresponding file:

Please choose among your favourites the files where you would like to file the email:


	File code	Specific code	File title	Chef de file	Status	Decimalisation
<input checked="" type="checkbox"/>	2009-AA4642	ICS10 0001	Formation Ares R1	digit.r.1	ACTIVE	11
<input type="checkbox"/>	2009-AA4642-1	scscs	1000 , datù f'f ràç 'çlé dhvdifj vs(;xc s...	digit.r.1	ACTIVE	11.2009-AA4642

(3) Click <Register and send>.


(4) You receive a confirmation:



(5) The document is **automatically registered**:

- the email metadata are put in the Ares document: the **sender**, the **recipient(s)** (except the persons in BCC) and the **subject**. The **body of the email is converted in .rtf**. and attached. (with 'Cover note ' type).
-  If the external entity is recognized by the system, the sender is set in the document. If the external entity is not recognized, it will be automatically created.

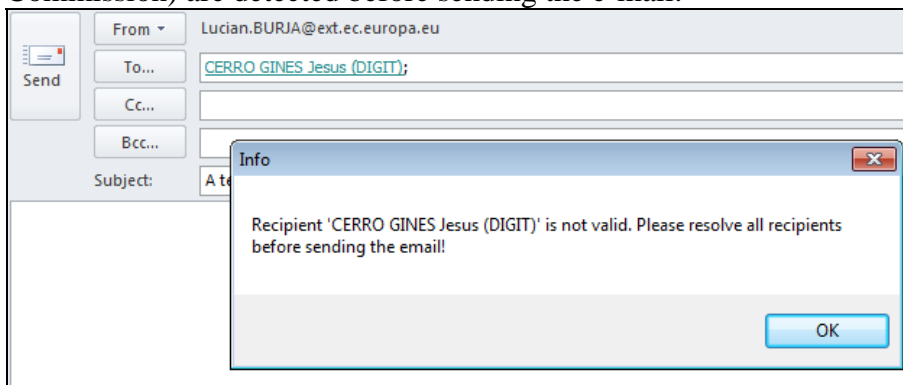
- **Conversion:**

- **HTML e-mail is converted to RTF with Microsoft Word.** Embedded objects (such as images) are now kept and the formatting is better preserved
 -  **The .msg format is never attached in ARES document for the outgoing e-mail.**
 - **Attachments are converted in pdf and stamped** (if their format can be converted by EC PDF Code) but the sender receives the original email (as drafted in Outlook) and not the Ares PDF stamped files.
- (6) The drafted email will be sent out through '*External transmission*' module (you may do a follow-up of the sending in that tab).

*: if you have done the importation. (see following chapter).

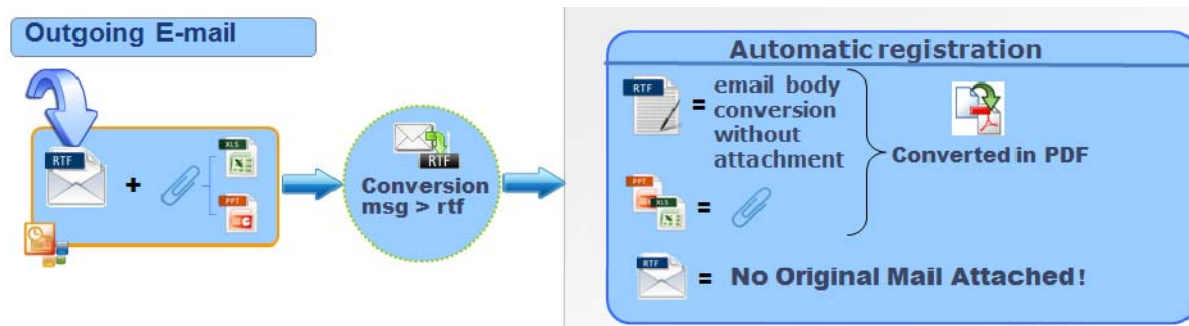
Notes

- The email recipient receives an email whose sender is EC ARES NO REPLY (ec-ares-xxxxxxx@xx.xxxxxx.xx)
- Ares registration number is added in the subject of the email (at the beginning of the title of the email).
- Invalid internal e-mail addresses (for example if a user has changed DG or left the Commission) are detected before sending the e-mail:



- When creating an e-mail, if the field '*from*' is filled with a name that is different from the name of the user currently using Areslook, the system checks if the user has received a delegation to work 'on behalf of'. Consequently, if you are not a member of a functional mailbox, you cannot register documents through Areslook on behalf of this mailbox

18.2.1. Summary: body and attachments of ARESLOOK OUTGOING e-mail



18.3. Importing favourite files

You may automatically import your Ares favourite files into Areslook: this enables you to file directly from Areslook confirmation window.

To import your favourites (one-off operation):

- (1) In the confirmation window, click on <Update favourites> (if you are not connected to Ares, you must first identify through ECAS.)
- (2) Your favourite files are automatically imported:

AresLook 3.0 - Incoming mail - Automatic save procedure

Save Cancel Update Favourites Update Virtual Entities

The automatic save procedure requires you to assign a registration task to a person or virtual entity to perform the quality control procedure of your document, in order to finalize the registration

From: RAEYMAEKERS Ralph (DIGIT-EXT) Date: 17/09/2013 15:18:16

Email title*: Training plan

Assign registration to*: Pers DELHAUWE Gregory (DIGIT-EXT) [checkmark]

Instruction:

Assign filing to: Pers [checkmark]

Instruction:

Please choose among your favourites the files where you would like to file the email:

	File code	Specific code	File title	Chef de file	Status	Decimalisation
<input checked="" type="checkbox"/>	2009-AA4642	ICS10 0001	Formation Ares R1	digit.r.1	ACTIVE	11
<input type="checkbox"/>	2009-AA4642-2	Manage the user...	Manage the users of the file (They ca...	digit.b.1.001	ACTIVE	11.2009-AA4642
<input type="checkbox"/>	2009-AD2233		Concurrence	digit.b.1	ACTIVE	09.01.04

Notes

- If you want to file a document in a specific file, please tick the corresponding file.

- Please re-do the operation when necessary (if your list of favourites has changed in Ares for example).

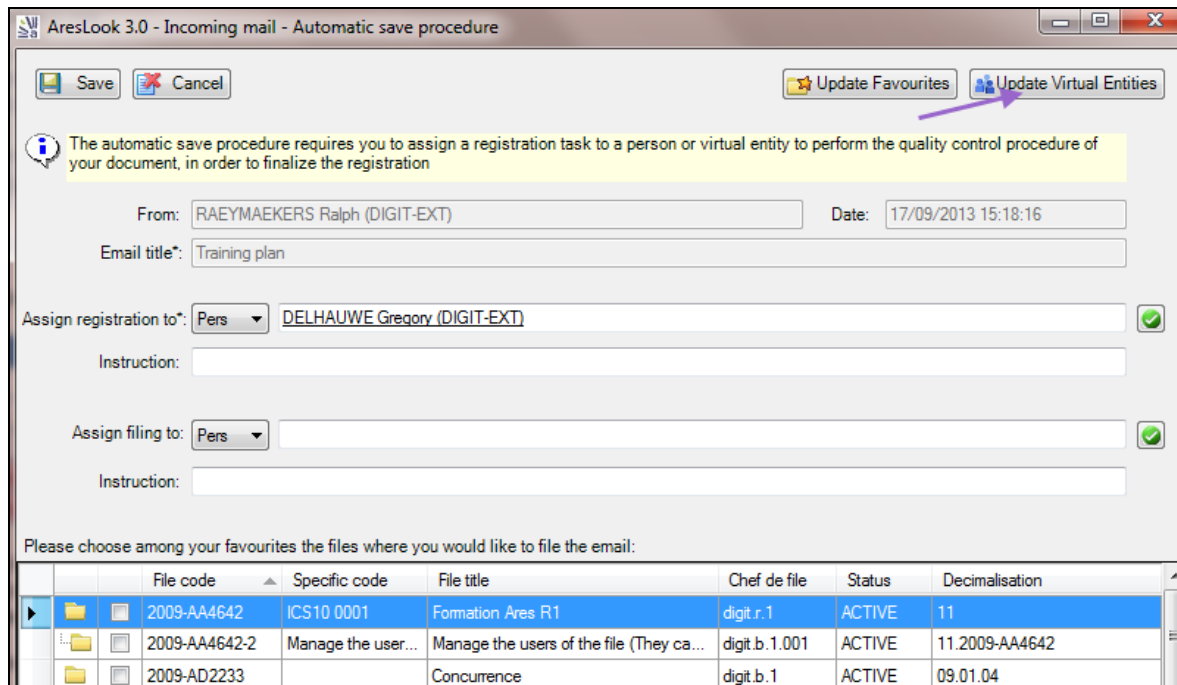
18.4. Importing virtual entities

You may assign a registration or filing task to a virtual entity. These entities are not recognized by default by AresLook plug-in (as it is the case with people from the l'Address Book).

It is however possible to import them: if you perform the operation once, the entities will be then available for your Arelook.

To import your virtual entities:

- (1) Click <Update virtual entities> button in Areslook confirmation window (if you are not yet connected to Ares, you must identify through ECAS first):

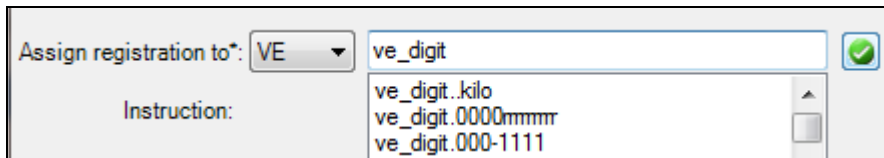


The screenshot shows the 'AresLook 3.0 - Incoming mail - Automatic save procedure' window. At the top, there are buttons for 'Save', 'Cancel', 'Update Favourites', and 'Update Virtual Entities'. A yellow message box states: 'The automatic save procedure requires you to assign a registration task to a person or virtual entity to perform the quality control procedure of your document, in order to finalize the registration'. Below this, the 'From' field is 'RAEYMAEKERS Ralph (DIGIT-EXT)' and the 'Date' is '17/09/2013 15:18:16'. The 'Email title' is 'Training plan'. The 'Assign registration to' dropdown is set to 'Pers' and the selected entity is 'DELHAUWE Gregory (DIGIT-EXT)'. The 'Assign filing to' dropdown is also set to 'Pers'. Below these are two 'Instruction' fields. At the bottom, a table lists file codes and titles.

	File code	Specific code	File title	Chef de file	Status	Decimalisation
	2009-AA4642	ICS10 0001	Formation Ares R1	digit.r.1	ACTIVE	11
	2009-AA4642-2	Manage the user...	Manage the users of the file (They ca...	digit.b.1.001	ACTIVE	11.2009-AA4642
	2009-AD2233		Concurrence	digit.b.1	ACTIVE	09.01.04

- (2) Virtual entities are automatically imported.
- (3) From now on, if you want to assign a task to a virtual entity:
 - Choose 'VE' from the drop-down list
 - Type the first letters of the entity (or its exact name).

- Click on 



The screenshot shows a dialog box with the following elements:

- A label "Assign registration to*" followed by a dropdown menu currently showing "VE".
- A text input field containing "ve_digit".
- A green checkmark icon in the top right corner.
- A label "Instruction:" followed by a list box containing three items: "ve_digit.kilo", "ve_digit.0000mmmm", and "ve_digit.000-1111".
- A small square button with an upward-pointing arrow next to the list box.

- Select the virtual entity double-clicking on its name or with the arrows of your keyboard and [enter].

Note

If an Outlook functional mailbox is linked to an Ares virtual entity, the answer that will be sent to the Outlook mailbox will also appear in the corresponding virtual entity '***Received documents***' (See point 20.8: Linking an Outlook functional mailbox with an Ares virtual entity).

See also

The Document tab page

Recovering entities

Creating a new document, entering and saving data

Registering a document

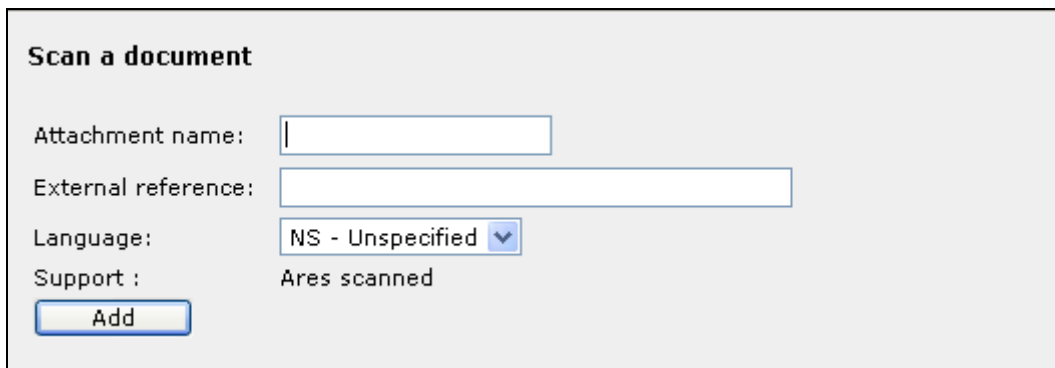
19. MODULE 19: SCANNING

Context

In Ares, you can add an attachment to a document by scanning.

Method

- (1) On the registration screen, click on <Scan> in the 'Content' field group.
- (2) Enter the relevant metadata for the attachment:



The screenshot shows a form titled "Scan a document". It contains the following fields and controls:

- Attachment name:** A text input field.
- External reference:** A text input field.
- Language:** A drop-down menu currently showing "NS - Unspecified".
- Support :** A label with the text "Ares scanned" next to it.
- Add:** A button located below the "Support :" label.

- (a) Enter the *Attachment name*.



You cannot enter special characters ('/', '*', '?', etc.) in the *Attachment name*. Ares automatically detects these as they are entered (the text becomes red) and it is impossible to add the attachment:



- (b) If required, enter the *External reference*.
- (c) Select the *language* of the document from the drop-down list.

- (d) The support data will be automatically detected and displayed as *Ares scanned*.
 - (e) Click on <Add>.
- (3) The document now appears in the *Content* field group on the *Document* tab page.



- (4) Continue the registration or save process.
- (5) In the *Identification* field group for the document, click on the bar code corresponding to the attachment.

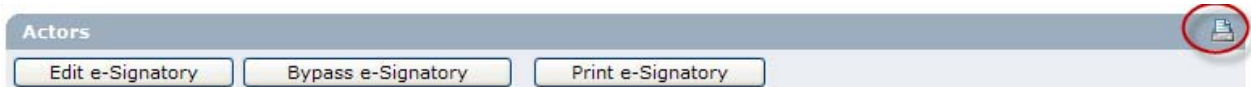
- (6) To print the divide, enter the print divider information:

- (a) The *Attachment name* is entered automatically.
- (b) Tick the following checkbox if your document is to be scanned on both sides.
- (c) Indicate the total number of pages.
- (d) Tick the following checkbox if you authorise the modification of the document.
- (e) Tick the last checkbox if you want to set an expiry date for using the divider.
- (f) Click on <Print> to start printing the divider.

- (7) Continue by using the UBS procedure (Universal Batch Scanning):
- (a) Put the divider which you have just printed in the appropriate copier, followed by the document(s) to be scanned.
 - (b) Select the button for scanning.
 - (c) The document is automatically scanned and sent to Ares as an attachment.

Note

-  You must generate the divider (i.e. you must click on <Scan> to enter the details of the divider) in the saved document before registration.
- You can also print the divider clicking on the <print> button at the end of the screen or from the icon :



See also

Creating a new document, entering and saving data

Registering a document

Adding an attachment to the document: Importing or Scanning

20. MODULE 20: MANAGING VIRTUAL ENTITIES

20.1. Definition

A virtual entity is a fictional entity that brings together users and/or groups under an identical name. Virtual entities are the equivalent of the Outlook functional mailboxes (e.g. SG-Domec) and Commission departments (e.g. DIGIT-B-4). These entities are considered to be internal entities.

In Ares, only the term 'virtual entity' will be used.



You create virtual entities **manually** in the application.

A virtual entity may contain several named persons (users) or groups. A 'profile' is assigned to a virtual entity (same behaviour as for a user). Users in the same virtual entity can belong to the same structure (e.g. the same Unit) or to different structures (e.g. a virtual entity for DMOs). The same person can belong to more than one virtual entity.



Virtual entities in Ares automatically appear in the form 've_xxx' (e.g. 've_echo.cad').

Virtual entities have several uses. First of all, they enable you to manage a function (e.g. 'DMO EEAS') or to group together the various 'hats' that a person wears at work (e.g. a person 'acting' in a position such as Head of Unit).

You can use a virtual entity as an actor in a workflow (*Assignment* or *e-Signatory*). For example, you can create a virtual entity called 've_echo.cad' for a DG and assign it a task.


This virtual entity will be managed in exactly the same way as other internal entities.

You yourself can also adopt the role of a virtual entity to perform tasks such as creating documents, creating assignments and consulting a **Tasks** menu to process tasks.



When you perform tasks as a virtual entity, you in fact log on with your own user name and password. Consequently, you keep your own identity even if you are acting as a virtual entity.

Notes

- Virtual entities are managed from the **Virtual entities** option in the **Administration** navigation menu.
-  You must have the profile 'Advanced secretary', 'CAD' or 'DMO' to see the menu **Virtual entities**. All virtual entities will be visible in Ares, but each DG manages its own virtual entities.

20.2. Virtual entities management

Left screen displays the whole list of elements, right screen displays the specific properties of the element you have selected on the left (for checking and/or modification).

For example: I select the virtual entity (ve_digit) clicking on its name on the left (blue hyperlink) in order to display its properties on the right:

The screenshot shows the 'Virtual entities management' interface. On the left, a table lists virtual entities with columns for Type, Name, and Owner. The entity 've_digit' is highlighted with a red box and a red arrow pointing to the right panel. The right panel, enclosed in a red dashed box, displays the 'Properties' and 'Members' for 've_digit'. The 'Properties' section includes fields for Name, ID, Address, Owner name, Default group, Type, Email, and Alias FMB. The 'Members' section shows a list of members with checkboxes and names.

Type	Name	Owner
F	digit ares tech	digit ares tech
F	digit ares training	digit ares training
F	digit irms support	digit irms support
M	ve_1.4.5.4	YADAV Priti
M	ve_470	DESCHAMPS Sylvie
M	ve_a1234b	TANGHE Gabriel
M	ve_aresteam	ve_aresteam
M	ve_autretestrechercheve	ve_autretestrechercheve
M	ve_clavema	CLAVERIE Marc
M	ve_digit	ve_digit
M	ve_digit dmo	CLAVERIE Marc
M	ve_digit..kilo	VEKEMANS Nicolas
M	ve_digit..kilo	VEKEMANS Nicolas
M	ve_digit..kilo	VEKEMANS Nicolas

Properties

Name :	ve_digit	Default group :	digit.dir
ID :	ve_68	Type :	MANUAL_VE
Address :		Email :	ve_digit
Owner name :	ve_digit	Alias FMB :	

Members

Name
BOUTE Fabienne
CERVENA Jitka
CZINK Tuende

If I select another virtual entity on the left, the right screen will be automatically updated accordingly.

You have the possibility to export the list of all virtual entities of the list of the members of a specific virtual entity: click on the corresponding Excel icons:

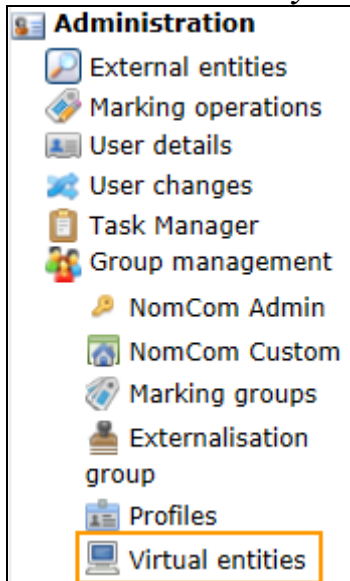
This screenshot is similar to the previous one, but it highlights the export options. In the left panel, the 'Show all' link and the Excel icon are highlighted with a red box. In the right panel, the 'Properties' and 'Members' sections are visible, and the 'Show all' link and the Excel icon in the members section are also highlighted with a red box.

In order to search for a specific virtual entity or to filter the list, please type the name of the virtual entity and click the <Search by name> button:

ve_digit Search by Name

20.3. Creating a new virtual entity

- (1) Click on '*Virtual entity*' menu under the '*Administration/ Groups management*' module:



- (2) The list of your DG's virtual entities is displayed. Click on <Add virtual entity> button, at the top of the screen:




The screenshot shows a web interface for managing virtual entities. At the top left, there is a button labeled 'Add virtual entity' (highlighted with a red box) and a 'Delete' button. Below these is a search bar with the text 'Search by Name'. A table lists existing virtual entities with columns for Type, Name, and Owner. To the right of the table are 'Modify' and 'Copy' buttons. Further right is a 'Properties' section with fields for Name, ID, Address, Owner name, Default group, Type, Email, and Alias FMB. Below the properties is a 'Members' section with 'Add member' and 'Delete member' buttons. At the bottom, it states 'This virtual entity has no members'.

Type	Name	Owner
<input type="checkbox"/> F	digit ares tech	digit ares tech
<input type="checkbox"/> F	digit ares training	digit ares training
<input type="checkbox"/> F	digit irms support	digit irms support
<input type="checkbox"/> M	ve_1.4.5.4	YADAV Priti
<input type="checkbox"/> M	ve_470	DESCHAMPS Sylvie
<input type="checkbox"/> M	ve_a1234b	TANGHE Gabriel
<input type="checkbox"/> M	ve_aresteam	ve_aresteam
<input type="checkbox"/> M	ve_autretestrechercheve	ve_autretestrechercheve
<input type="checkbox"/> M	ve_clavema	CLAVERIE Marc

Properties	
Name :	digit ares tech
ID :	ve_ad00078605
Address :	
Owner name :	digit ares tech
Default group :	digit.b.1
Type :	FUNCTIONAL_MAIL_BOX
Email :	DIGIT-ARES-TECH@ec.euro
Alias FMB :	ve_ad00078605

Members	
This virtual entity has no members	

- (3) Fill in the right fields:

- Type: Type the name of the virtual entity.  The name of the entity always begin with your DG name (the latter is added automatically by the system).
 - Owner name: the concerned person/group has modification rights on the entity. Your name is put by default. You may modify it: click on  icon then type the new name/service.
 - **Default group: service associated to the entity. This service is displayed in the autocomplete, will generate the save number of a new document and will give the right to file.** The entity creator's service is taken by default. You may modify: click on  icon then type the new service.
 - Address: physical address of the entity (office).
 - Alias: Outlook number (only for funtional mailboxes). It is completed if there is a link between Ares virtual entity and Outlook funtional mailbox.
 - E-Mail: same useful même utilité que les alias.
- (4) Click on <save> to confirm (or <Cancel>).
- (5) Then you may add people/groups inside that entity: click <Add member> (under 'Members' menu):

Modify Copy

Properties

Name : ve_digit.digit.b.1 Default group : digit.b.1.001

ID : ve_3516 Type : MANUAL_VE

Address : Email :

Owner name : KACI Emilie Alias FMB :

Members

Add member Delete member

This virtual entity has no members

- (6) Type the first letters of the person/group and select if from the drop-down list:

Add members -- Webpage Dialog

Ok Cancel

delha

- DELHAIE Laurent
- DELHAUWE Gregory
- DELHAXHE Arlette
- DELHAXHE-WOLMERING Véronique
- DELHAYE Céline
- DELHAYE Marc

- (7) Re do operation 6) if you want to add others.
- (8) Click on <Ok> to confirm or <Cancel>.

Notes

- If you have a DMO or CAD profile, you may add users from another DG.
- You are only able to modify the virtual entities of your DG (i.e. virtual entities whose default group is a service from your DG).

20.4. Modifying the properties of a virtual entity

- (1) Click on '*Virtual entity*' under '*Administration/Groups management*' menu and click on the virtual entity you would like to modify.
- (2) Its properties are displayed on the right:

Buttons: Add virtual entity, Delete

Search by Name

Page(s): 1, 2 Item(s) per page: 100 Show all

Type	Name	Owner
<input type="checkbox"/>	digit ares tech	digit ares tech
<input type="checkbox"/>	digit ares training	digit ares training
<input type="checkbox"/>	digit irms support	digit irms support
<input type="checkbox"/>	ve_1.4.5.4	YADAV Priti
<input type="checkbox"/>	ve_470	DESCHAMPS Sylvie
<input type="checkbox"/>	ve_a1234b	TANGHE Gabriel
<input type="checkbox"/>	ve_aresteam	ve_aresteam
<input type="checkbox"/>	ve_autretestrechercheve	ve_autretestrechercheve
<input type="checkbox"/>	ve_clavema	CLAVERIE Marc
<input type="checkbox"/>	ve_digit	ve_digit
<input type="checkbox"/>	ve_digit dmo	CLAVERIE Marc
<input type="checkbox"/>	ve_digit..kilo	VEKEMANS Nicolas
<input type="checkbox"/>	ve_digit.0000rrrrrrrr	KAKURU RADHA Madhava

Buttons: Modify, Copy

Properties

Name : ve_aresteam Default group : digit.b.1

ID : ve_140 Type : MANUAL_VE

Address : Email : ve_aresteam

Owner name : ve_aresteam Alias FMB :

Members

Buttons: Add member, Delete member

Page(s): 1 Item(s) per page: 30 Show all

Name
<input type="checkbox"/> HENIN Vincent
<input type="checkbox"/> KACI Emilie
<input type="checkbox"/> SWIECH Agnieszka
<input type="checkbox"/> WILLAIN Jean-Christophe

- (3) Click on <Modify>.
- (4) Modify the necessary fields (see previous chapter for details).
- (5) Click on <Modify> to validate.

Notes

- You can only modify the virtual entities of your DG.
- To delete members, click on the name of the entity (in blue). On the right of the screen, under 'Members' menu, tick the people you would like to delete. Confirm with <Delete member>.

Buttons: Add virtual entity, Delete

Search by Name

Page(s): 1, 2 Item(s) per page: 100 Show all

Type	Name	Owner
<input type="checkbox"/>	digit ares tech	digit ares tech
<input type="checkbox"/>	digit ares training	digit ares training
<input type="checkbox"/>	digit irms support	digit irms support
<input type="checkbox"/>	ve_1.4.5.4	YADAV Priti
<input type="checkbox"/>	ve_470	DESCHAMPS Sylvie
<input type="checkbox"/>	ve_a1234b	TANGHE Gabriel
<input type="checkbox"/>	ve_aresteam	ve_aresteam
<input type="checkbox"/>	ve_autretestrechercheve	ve_autretestrechercheve
<input type="checkbox"/>	ve_clavema	CLAVERIE Marc
<input type="checkbox"/>	ve_digit	ve_digit
<input type="checkbox"/>	ve_digit dmo	CLAVERIE Marc
<input type="checkbox"/>	ve_digit..kilo	VEKEMANS Nicolas
<input type="checkbox"/>	ve_digit.0000rrrrrrrr	KAKURU RADHA Madhava

Buttons: Modify, Copy

Properties

Name : ve_aresteam Default group : digit.b.1

ID : ve_140 Type : MANUAL_VE

Address : Email : ve_aresteam

Owner name : ve_aresteam Alias FMB :

Members

Buttons: Add member, Delete member

Page(s): 1 Item(s) per page: 30 Show all

Name
<input checked="" type="checkbox"/> HENIN Vincent
<input type="checkbox"/> KACI Emilie
<input type="checkbox"/> SWIECH Agnieszka
<input type="checkbox"/> WILLAIN Jean-Christophe

20.5. Renaming a virtual entity

The history of virtual entities is now kept. You can rename a virtual entity (useful for reorganisations).

- (1) Under '*Administration/Groups management*' menu, click '*Virtual entities*'.
- (2) On the left of the screen, select the virtual entity you would like to modify. Its details are displayed on the right:

The screenshot shows the 'Virtual entities' management interface. On the left, a table lists virtual entities. The entity 've_digit.b.2' is selected, and a purple arrow points from it to the 'Properties' panel on the right. The 'Properties' panel shows details for 've_digit.b.2', including its ID, type, address, owner name, and default group. Below the properties is a 'Members' section with a list of users.

Type	Name	Owner
<input type="checkbox"/> M	ve_digit.b.1	TANGHE Gabriel
<input type="checkbox"/> M	ve_digit.b.1.1	
<input type="checkbox"/> M	ve_digit.b.2	KACI Emilie
<input type="checkbox"/> M	ve_digit.base	KAKURU RADHA Madhava

Properties


Name : ve_digit.b.2 Default group : digit.b.2
 ID : ve_6975 Type : MANUAL_VE
 Address : Email :
 Owner name : KACI Emilie Alias FMB :

Members

Add member Delete member




Page(s): 1 Item(s) per page: 30 Show all

Name
<input type="checkbox"/> ABECASIS Margarida
<input type="checkbox"/> DE LA MOTTA Imma

- (3) Click <Modify>.
- (4) Click  icon next to the 'name' of the virtual entity:

The screenshot shows the 'Properties' panel for the virtual entity 've_digit.b.2'. The 'Name' field is highlighted with a purple arrow pointing to the 'X' icon next to it, indicating that the name is editable.

Properties

Type : Manual virtual entity
 Name : ve_ digit . b.2 
 Owner name : User KACI Emilie 
 Default group : digit.b.2 
 Address :
 Alias FMB :
 Email :

- (5) The 'name' attribute will be editable.

Save Cancel

Properties

Type : Manual virtual entity

Name : ve_ digit . b.3

Owner name : User KACI Emilie

Default group : digit.b.2

Address :

Alias FMB :

Email :

(6) Confirm the change by clicking on the 'Save' button.

Notes

- Do not forget to check the 'default group' value of the virtual entity: a virtual entity is correct in Ares only if its status is 'active' and if its default group exists in the autocomplete. For example, after a re-organisation, the 'default group' might be changed.
- After modifying a virtual entity's name, the change will be visible 24 hours after in the autocomplete.

20.6. Copying a virtual entity

You may copy the properties of an existing virtual entity and create a new one.

- Select the reference entity.
- Click on <Copy> at the top right:

Add virtual entity Delete

Search by Name

Page(s): 1, 2 Item(s) per page: 100 Show all

Type	Name	Owner
F	digit ares tech	digit ares tech
F	digit ares training	digit ares training
F	digit irms support	digit irms support
M	ve_1.4.5.4	YADAV Priti
M	ve_470	DESCHAMPS Sylvie
M	ve_a1234b	TANGHE Gabriel
M	ve_aresteam	ve_aresteam
M	ve_autretestrechercheve	ve_autretestrechercheve
M	ve_clavema	CLAVERIE Marc
M	ve_digit	ve_digit
M	ve_digit dmo	CLAVERIE Marc
M	ve_digit..kilo	VEKEMANS Nicolas
M	ve_digit.0000rrrrrrrrrr	KAKURU RADHA Madhava

Modify Copy

Properties

Name : ve_aresteam Default group : digit.b.1

ID : ve_140 Type : MANUAL_VE

Address :

Email : ve_aresteam

Owner name : ve_aresteam Alias FMB :

Members

Add member Delete member

Page(s): 1 Item(s) per page: 30 Show all

Name
HENIN Vincent
KACI Emilie
SWIECH Agnieszka
WILLAIN Jean-Christophe

- All fields of the reference entity are displayed, except its name (if the fields had been filled in the reference entity).

20.7. Deleting a virtual entity

- (1) Tick the entity you would like to delete (you may tick several entities at the same time).
- (2) Click on <Delete> button at the top of the screen.



Note

Before deleting a virtual entity, please check the access on virtual entities' documents is kept (ex: on documents where the virtual entity is creator/ manager of the e-signatory/ workflow participant...); documents must be filed and/or be accessible by another stakeholder.

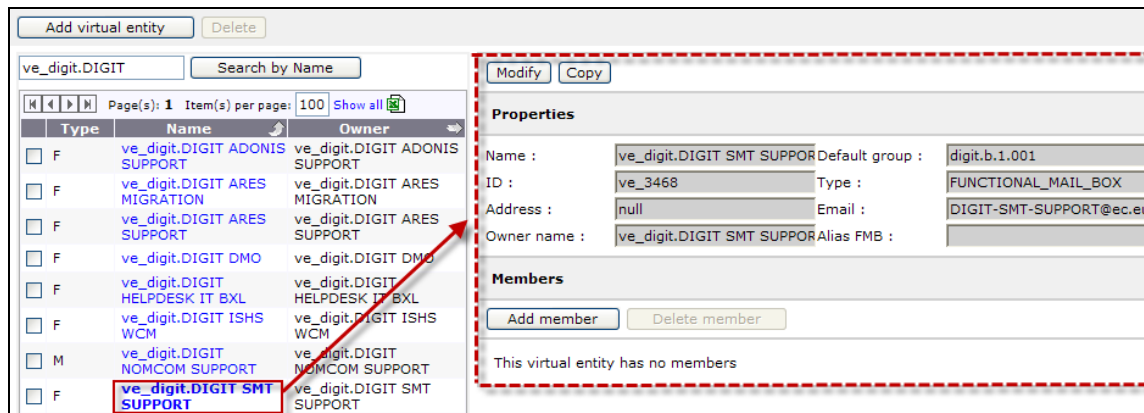
20.8. Linking an Outlook functional mailbox with an Ares virtual entity

Context

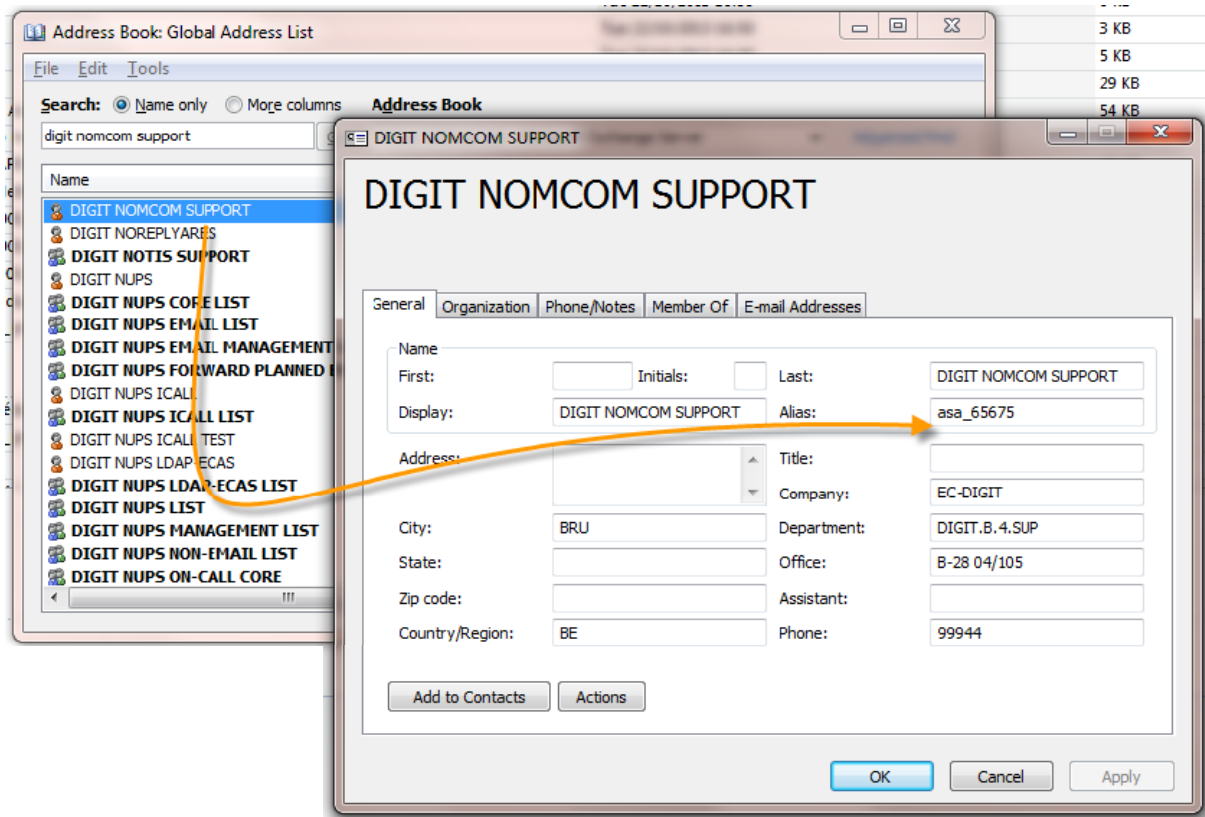
You must link an Outlook functional mailbox with an Ares virtual entity if you want to send an email 'from' that Outlook mailbox with Areslook. Please put the functional mailbox alias in the properties of the corresponding virtual entity. Thus the answer sent to the Outlook functional mailbox will also appear in Ares '*Received documents*' of the virtual entity.

Method

- (1) In the '*Virtual entity*' menu, select the entity to update:



- (2) In the top right modification screen, click on <Modify>.
- (3) Find the functional mailbox alias from Outlook Address Book.



- (4) Copy-paste this alias in the corresponding virtual entity field:

The image shows the 'Properties' window for a virtual entity. The 'Type' is set to 'Manual virtual entity'. The 'Name' is 've_digit.DIGIT SMT SUPPORT'. The 'Owner name' is 'User ve_digit.DIGIT SMT'. The 'Default group' is 'digit.b.1.001'. The 'Address' field is empty. The 'Alias FMB' field is highlighted with a red box and contains the value 'asa_39375'. The 'Email' field contains 'DIGIT-SMT-SUPPORT@ec.eu'.

- (5) Click on <Save> to confirm (or <Cancel> to stop the process).

21. MODULE 21: SPECIFIC PROCEDURE: PRESIDENT'S MAIL (COURRIER DU PRÉSIDENT)

Context

The Sybil application managing the 'Courrier du Président' (CdP) was decommissioned end 2011. CdP process is now fully integrated in ARES.

The President's mail is managed at several levels, depending on the procedure.

21.1. Applying a specific Cdp procedure

Following registration, the CdP team applies a specific procedure to the document. Only users belonging to ve_sg.cdp have access to the procedures management.

Under '*Doc Actions*' menu, click <Manage procedure>.

The screenshot shows the Sybil application interface. At the top, there are tabs: Document, Filing, Assignment, e-Signatory, and Link. The 'Document' tab is active. Below the tabs, there is a section for 'Identification' with fields for Registration number (Ares(2011)1063), Save number (ca.1.cab staff(2011)2133), and Registration date (28/09/2011). The Title field contains 'Demande d'intervention festival des arts visuels'. Below this is a table with columns: Type, Ares, Native, Lang., External ref., Size, and Version. The table has one row: 'Main document'. To the right of the table is a 'Doc Actions' menu with options: Copy, Answer, Modify special, Print, Send link, Add translation, and Manage procedure (highlighted with a red box). Below the table is a section for 'I/E' (Internal/External) with fields for Sent by (RABAY EVA), Service/Organisation (SANS ORGANISATION), I/E (I), TO/CC (TO), Received by (BARROSO Jose Manuel), and Service/Organisation (CA.1). Below this is a section for 'Mail type' (Internal) and 'Document date' (28/09/2011). Other fields include Creation date (28/09/2011), Creator (VEKEMANS Nicolas), Register author (VEKEMANS Nicolas), Level of sensitivity (Normal), Document encrypted (No), Encryption Expiration Date, Comments, Signed by, Marking Expiration Date, and Person concerned.

- (1) Select from the drop-down list the necessary procedure or type its first letters (autocomplete will display the corresponding name):

The screenshot shows a 'Procedure' dialog box. It has a title bar 'Procedure' and a message 'There's currently no procedure linked to the document.' Below the message is a text input field labeled 'New procedure:' containing 'cdp'. A drop-down list is open, showing a list of procedures: CdP, CdP\Note 1, CdP\Note 1\MCM, CdP\Note 2, CdP\Note 2\MCM, CdP\Note 3, CdP\Note 3\MCM, CdP\Note 4, CdP\Note 4\MCM, and CdP\Note 5. A mouse cursor is pointing at 'CdP\Note 3\MCM'. To the right of the list are 'Ok' and 'Cancel' buttons.

Please find below a reminder of all procedures:

- Note 1: DG Chef de File (CF) prepares a draft reply to be signed by the President or a member of the cabinet.
- Note 2: DG CF provides elements for a draft reply to be prepared by CdP team and signed by the President or a member of the cabinet.
- Note 3: DG CF examines and provides appropriate follow-up.
- Note 4: DG CF replies in the name of the President.
- Note 5: document is sent for information.
- Note 6: CdP team prepares a draft reply to be signed by the President or a member of the cabinet or by CdP team.
- PTR: patronage request addressed to the President (follow-up assignment)
- PTI: petition sent to the President (follow-up assignment).

(2) Click <OK> to save. Procedure type is displayed in the document details:

The screenshot shows a document identification window with the following details:

- Registration number:** Ares(2011)1063
- Save number:** ca.1.cab staff(2011)2133
- Registration date:** 28/09/2011
- Title:** Demande d'intervention festival des arts visuels
- Procedure:** CdP>Note 2/MCM (highlighted in a red box)

Type	Ares	Native	Lang.	External ref.	Size	Pages	Version
Main document			NS		0.73 MB	2	

On the right side, there is a 'Doc Acti' panel with options: Copy, Answer, Modify special, Print, Send link, and Add translation.

Note

The type of procedure is also displayed in the document tooltip.

The tooltip for the document 'Demande d'intervention festival des arts visuels' displays the following information:

- Creation date:** 28/09/2011
- Encoding Date:** 28/09/2011
- Registration date:**
- Save number:** ca.1.cab staff(2011) 2136
- Registration number:**
- Comments:**
- Procedure:** CdP>Note 5
- Sender(s):** No sender found
- Recipient(s):** BARROSO Jose Manuel (CA.1), RABAY EVA (SANS ORGANISATION)
- Attachment(s):** No file imported

21.2. Creating a response document

When creating a response to a document bearing a procedure, the value of the procedure type field is automatically copied by the system to the response document if you use the functionality <Answer>.

(1) Under '*Doc Actions*' menu, click <Answer> on the concerned document:

The screenshot shows a document interface with the following details:

- Registration number:** Ares(2011)1063
- Save number:** ca.1.cab staff(2011)2133
- Registration date:** 28/09/2011
- Title:** Demande d'intervention festival des arts visuels
- Procedure:** Cdp/Note 2/MCM (highlighted in a red box)
- Doc Actions menu:** Copy, Answer (highlighted in a red box), Modify special, Print, Send link, Add translation, Manage procedure.
- Table:**

Type	Ares	Native	Lang.	External ref.	Size	Panes	Version
Main document			NS		0.73 MB	2	
- Metadata:**
 - Mail type:** Internal
 - Creation date:** 28/09/2011
 - Creator:** VEKEMANS Nicolas
 - Register author:** VEKEMANS Nicolas
 - Level of sensitivity:** Normal
 - Document encrypted:** No
 - Encryption Expiration Date:**
 - Comments:**
 - Signed by:**
 - Document date:** 28/09/2011
 - Sent date:** 28/09/2011
 - On behalf of:** ve_sg.cdp
 - Marking:**
 - Marking Expiration Date:**
 - Person concerned:**

(2) The CdP procedure is automatically copied to the response document:

The screenshot shows a document interface with the following details:


- Save number:** ca.1.cab staff(2011)2137
- Title:** Demande d'intervention festival des arts visuels
- Procedure:** Cdp/Note 2/MCM (highlighted in a red box)
- Doc Actions menu:** Copy, Answer (highlighted in a red box), Modify, Print, Send link, Add translation, Manage procedure.
- Table:**

Type	Actions	Native	Lang.	External ref.	Version
No file imported					
- Metadata:**
 - Mail type:** Internal
 - Creation date:** 28/09/2011
 - Creator:** VEKEMANS Nicolas
 - Register author:**
 - Level of sensitivity:** Normal
 - Document encrypted:** No
 - Encryption Expiration Date:**
 - Comments:**
 - Signed by:**
 - Document date:**
 - Sent date:**
 - On behalf of:** ve_sg.cdp
 - Marking:**
 - Marking Expiration Date:**
 - Person concerned:**

Note

Reminder: the <Answer> button is available to stakeholders and '*file readers*' of the file where the document is filed.

21.3. Multiple e-signatory managers

You can have more than one user or virtual entity as e-signatory managers.  This option is always available, not only for CdP documents.

Those managers will have the same rights in the e-signatory:

The screenshot shows a dialog box titled 'Creation of e-Signatories -- Webpage Dialog' with the following details:

- Buttons:** Save, Save and Launch, Cancel Modification
- Manager list:**


Manager:	ve_sg.cdp	Organisation:	CA.1.CAB STAFF	X
	DEBLIRE Philippe	Organisation:	DIGIT.B.1.001	X
		Organisation:		X
- Table:**

New tasks :	Action code	Last Name - First Name	Organisation / Service	Deadline	Critical	Up/Down
-------------	-------------	------------------------	------------------------	----------	----------	---------

Note

Document creator and current task owner can add another second e-signatory manager but may not modify or delete already existing e-signatory manager(s).

21.4. 'Tasks' menu display

In the tasks menu, all views have a new column that displays the 'type of procedure'. This column can be sorted by type of procedure by clicking on the 



	Code	Proc.	Subject	From
<input type="checkbox"/>	CF	CdP\ PTR	R-Demande de patronage de M. Barroso pour la coupe du monde de football (Ares(2011)1072) - avis formel du SG , positif	DANDOU Olivier (CA.1.CAB STAFF)
<input type="checkbox"/>	CF	CdP\ Note 1	normes de sécurité alimentaire - protestation contre la proposition de directive en élaboration	ve_ca.1.sg.cdp (CA.1.CAB STAFF)
<input type="checkbox"/>	CF	CdP\ Note 3	chute des feuilles - anomalie - changement climatique	ve_bepa.cdp (BEPA.01)
<input type="checkbox"/>	CF	CdP\ Note 1	Constructions européennes à basse énergie	ve_sg.cdp (CA.1.CAB STAFF)
<input type="checkbox"/>	CF	CdP\ Note 1	Test 123 - ...	ve_sanco.cdp (SANCO.A.4.001)
<input type="checkbox"/>	CF	CdP\ Note 1	Test 123 - ...	ve_ca.1.cad (CA.1.CAB STAFF)
<input type="checkbox"/>	INFO	CdP\ Note 2	test 3	ELORZA Aitor (SG.DSG1.B.2)

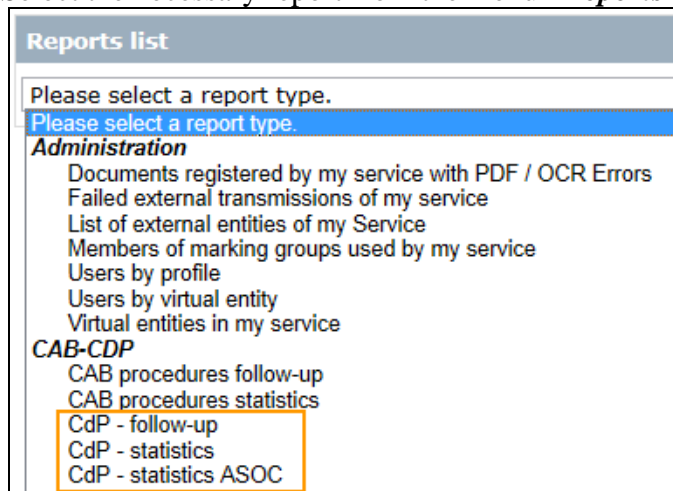
21.5. CDP reports

The SG's CdP team needs to assess the quality of the CdP process throughout the DGs. Therefore, two reports will be available (only available to CdP team). They will be executed in an asynchronous mode (the execution runs in the background while you continue to work with the application)²⁷:

- **Central CdP statistics:** displays the total of documents by procedure type for all DGs (one line per DG).
- **CDP procedures statistics (ASOC):** reports ASOC tasks in order to make an evaluation of work in associated DGs
- **CdP follow-up:** displays all documents where a procedure has been applied (one line per document/procedure)

²⁷ 2 reports are also available to DMO profiles. Please read 'Ares Administration manual' for details.

- (1) Select the necessary report from the menu **'Reports'**.



Reports list

Please select a report type.

Please select a report type.

Administration

- Documents registered by my service with PDF / OCR Errors
- Failed external transmissions of my service
- List of external entities of my Service
- Members of marking groups used by my service
- Users by profile
- Users by virtual entity
- Virtual entities in my service

CAB-CDP

- CAB procedures follow-up
- CAB procedures statistics
- CdP - follow-up
- CdP - statistics
- CdP - statistics ASOC

- (2) Enter the necessary criteria:

- CdP Statistics report (for CdP team):



CdP - statistics

☒ Globalize

DG (name) ca.15

☐ Detailed by sub-services

Registration date

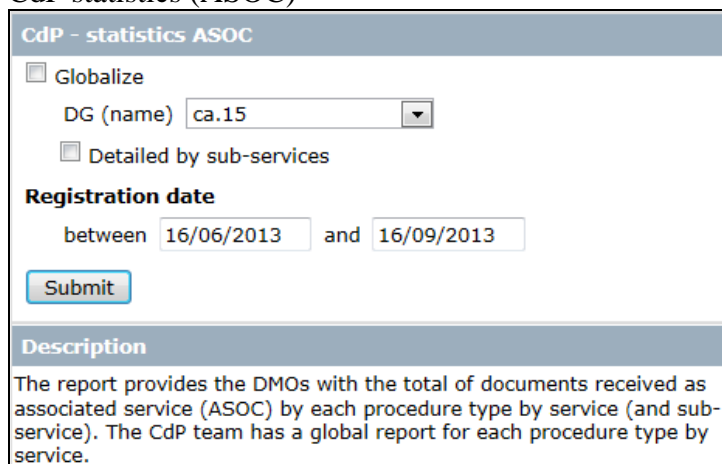
between 16/06/2013 and 16/09/2013

Submit

Description

The report provides the DMOs with the total of documents by each procedure type by service (and sub-service). The CdP team has a global report for each procedure type by service.

- CdP statistics (ASOC)



CdP - statistics ASOC

☒ Globalize

DG (name) ca.15

☐ Detailed by sub-services

Registration date

between 16/06/2013 and 16/09/2013

Submit

Description

The report provides the DMOs with the total of documents received as associated service (ASOC) by each procedure type by service (and sub-service). The CdP team has a global report for each procedure type by service.

- Follow-up report for CdP team:

CdP - follow-up

Filter documents on

Procedure

Reg. date between and

With last CF task

Assigned by

Assigned to

Deadline between and

Show document tasks with

Task code

☒ Only last CF

Description

This report provides the list of all documents tagged with the CdP procedure. For each document, it gives a snapshot of the current status of the procedure (incoming document and linked reply).

- (3) Click <Submit> button.
- (4) Corresponding reports are displayed at the right of the screen.

21.6. Search criterion: CdP 'procedure'

Search criteria

Search Simple

Full text search

Text

☐ Exact sentence
☒ All words
☐ At least one word

Exclude metadata search (content only) ☐

Documents *

Title contains
Reg. number starts with
Save number starts with
Ext. reference contains
Procedure cdp
Attachment name CdP
Lvl. of sensitivity CdP\Note 1
Marking CdP\Note 1\MCM
Encryption CdP\Note 2
Ext. status CdP\Note 2\MCM
CdP\Note 3
CdP\Note 3\MCM
CdP\Note 4
CdP\Note 4\MCM
CdP\Note 5

Stakeholders

Search

reset

- (1) Under *Search/documents*, click <Advanced>
- (2) Under '*Procedure*', type the first letters of the requested procedure.
- (3) Select it from the proposed list.
- (4) Launch with <Search>.

22. MODULE 22: SPECIFIC PROCEDURE: CABINET PROCEDURE (CAB)

Context

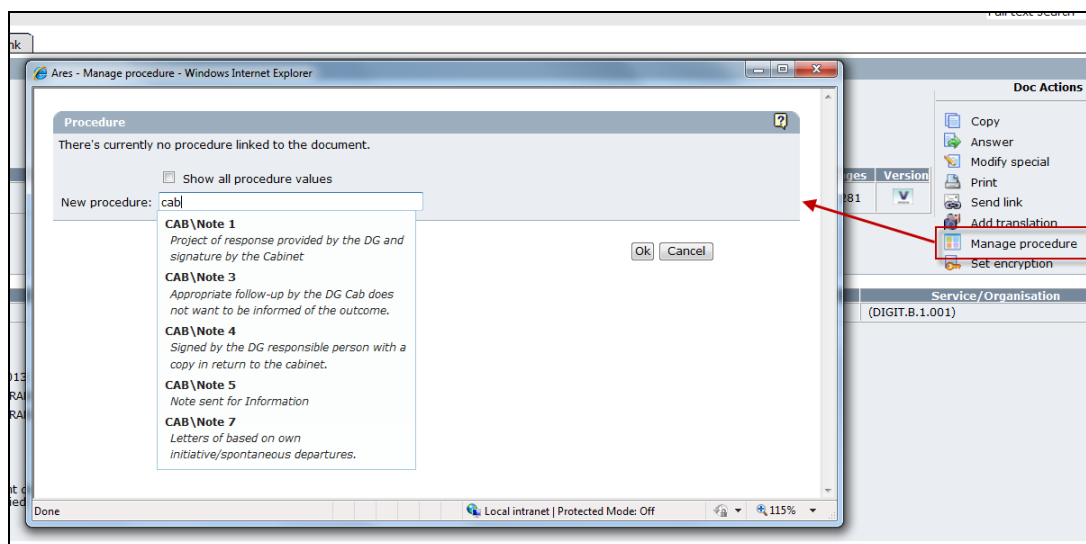
This procedure shows the specific workflow that should be followed between the cabinets and the DGs for a document. It is managed like the CdP procedure.

List of available CAB procedures:

Procedure Value	Definition
CAB\Note 1	Project of response provided by the DG and signature by the Cabinet
CAB\Note 1\MCM	Indicates the launch of an MCM query among ALL Commissioners
CAB\Note 1\MCMRelex	Indicates the launch of an MCM query among the RELEX group of Commissioners
CAB\Note 2	Elements of responses provided by the DG the and signature by the Cabinet
CAB\Note 2\MCM	Indicates the launch of an MCM query among ALL Commissioners
CAB\Note 2\MCMRelex	Indicates the launch of an MCM query among the RELEX group of Commissioners
CAB\Note 3	Appropriate follow-up by the DG
CAB\Note 3\MCM	Indicates the launch of an MCM query among ALL Commissioners
CAB\Note 3\MCMRelex	Indicates the launch of an MCM query among the RELEX group of Commissioners
CAB\Note 4	Signed by the DG responsible person
CAB\Note 4\MCM	Indicates the launch of an MCM query among ALL Commissioners
CAB\Note 4\MCMRelex	Indicates the launch of an MCM query among the RELEX group of Commissioners
CAB\Note 5	Note sent for Information
CAB\Note 5\MCM	Indicates the launch of an MCM query among ALL Commissioners
CAB\Note 5\MCMRelex	Indicates the launch of an MCM query among the RELEX group of Commissioners
CAB\Note 6	Project of response and signature by the Cabinet
CAB\Note 6\MCM	Indicates the launch of an MCM query among ALL Commissioners
CAB\Note 6\MCMRelex	Indicates the launch of an MCM query among the RELEX group of Commissioners
CAB\Note 7	Letters of based on own initiative/spontaneous departures.
CAB\Note 7\MCM	Indicates the launch of an MCM query among ALL Commissioners
CAB\Note 7\MCMRelex	Indicates the launch of an MCM query among the RELEX group of Commissioners
CAB\PTR	Patronage
CAB\PTI	Petition

22.1. Applying a specific CAB procedure

- (1) If you have the requisite rights, click on <Manage procedure> under '*Doc Actions*'
- (2) Type the first letters of the adequate procedure and select it. (Details of the procedures are displayed in the autocomplete. If you simply want to have the list of procedures, without details, tick <show all procedure values> button).



- (3) Validate with <ok>. Details of the procedure are displayed in the document details:

Document	Filing*	Assignment	e-Signatory	Link*
Identification				
Registration number : Ares(2013)189		Save number : digit.b.1.001(2013)291		Registration date : 12/09/2013
Title : DIGIT .B.1 001 after notification		Procedure CAB\Note 1		

22.2. CAB reports

22.2.1. CAB procedures follow-up

This report provides the list of all documents tagged with the CAB procedure. For each document, it gives a snapshot of the current status of the procedure (incoming document and linked reply). A few filters are available: each cabinet can follow the documents they have

attributed to services/DGs and each service / DG the documents they were attributed:

CAB procedures follow-up

Filter documents on

Procedure

Reg. date between
and

With CF Tasks

☐ Assigned by my admin. entity

☐ Assigned to my admin. entity

☒ Assigned by and to my admin. entity

Assigned by

Assigned to

Deadline between
and

Show document tasks with

Task code
☒ Only last CF

22.2.2. CAB procedures statistics

This report provides the amount of notes by procedure type for your service (or for the whole DG if you have a DMO profile) for a specific period of time:

CAB procedures statistics

Deadline date

between
and

☒ Detailed by sub-services

☐ Show totals for all procedure values (defaults are CABNote 1, CABNote 4 and Others)

Tips: 'Deadline date' is the date of the last CF task of the incoming document. In the Excel output, a note is 'replied' when the response document is registered. A note is 'Late replied' when the registration date of the response document is after the deadline date. A 'Not replied Note' is when the response document is not registered. A note is 'on time' when the registration date of the response document is before or equal to the deadline date.

22.3. Search criterion: CAB 'procedure'

The screenshot shows a 'Search criteria' dialog box with the following sections:

- Search criteria** (header)
- Search** (button)
- Simple** (button)
- Full text search** (section header)
 - Text** (input field)
 - ☐ Exact sentence
 - ☒ All words
 - ☐ At least one word
 - Exclude metadata search (content only) ☐
- Documents *** (section header)
 - Title** (dropdown: contains, input field)
 - Reg. number** (dropdown: starts with, input field)
 - Save number** (dropdown: starts with, input field)
 - Ext. reference** (dropdown: contains, input field)
 - Procedure** (input field: cab|, dropdown list: CAB\Note 1, CAB\Note 2, CAB\Note 3, CAB\Note 4, CAB\Note 5, CAB\Note 6, CAB\Note 7)
 - Attachment name** (input field)
 - Lvl. of sensitivity** (input field)
 - Marking** (input field)
 - Encryption** (input field)
 - Ext. status** (input field)
- Stakeholders** (section header)
 - CAB\PTI** (input field)
 - CAB\PTR** (input field)
- Search** (button)
- Reset** (button)

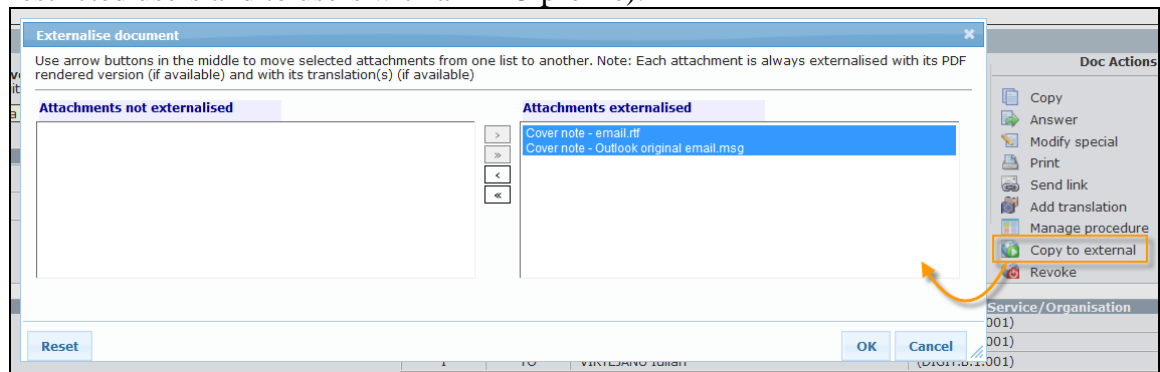
- (1) Under *Search/documents*, click <Advanced>
- (2) Under '*Procedure*', type the first letters of the requested procedure.
- (3) Select it from the proposed list.
- (4) Launch with <Search>.

23. MODULE 23: SPECIFIC PROCEDURE: MANAGE EXTERNAL REPOSITORY SERVICES (ERS)

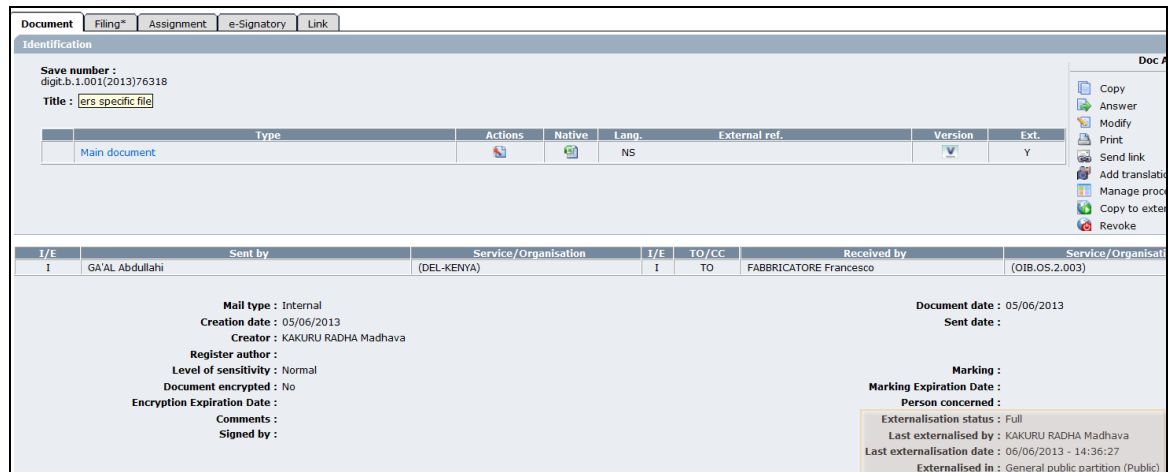
23.1. What is ERS

The first ERS release sets up an external repository and a set of services to make some Hermes documents available outside the Commission (ex: to the public, to restricted audiences...) via portals. Please contact your DMO should you need information concerning this accessibility.

A new screen allows managing the copy to external of the documents (accessible to restricted users and to users with a DMO profile):



Ares 'Document' and 'search' screens have been updated accordingly to show the new information about the copy to the external ('externalisation'):



The search and consultation of these documents will be available soon through some client applications like Sygma, DocsRoom, Carol...

23.2. Detailed use of ERS

- What is the document copy to the external (externalisation)?

For each externalised document, a set of metadata and attachment(s) are copied to the external ('externalised'). The copy to external of a Hermes document attachment(s) includes the last version of the native content, the associated translations and the PDF rendering²⁸ (if the native format is supported for the rendering).

-  **Constraints for the copy to external**

A document may be copied to external only when it is filed AND saved or registered in Hermes. Documents with a marking and/or encrypted documents cannot be copied to external. Only the last version of an attachment can be copied.

- **How can you copy to external a document through Ares?**

First, ask privileges to your DMO to be able to copy to external²⁹.

You can choose to copy to external all document attachments or just some of them. Each content of an attachment has its own 'externalisation' status (Y/N) to help you determine which content is copied or which was added after the copy.

After the copy, the documents in the External Repository are not directly available to the outside. It is up to the client application, accessible to the external users, to disclose (or not) these documents and their associated metadata to the outside.

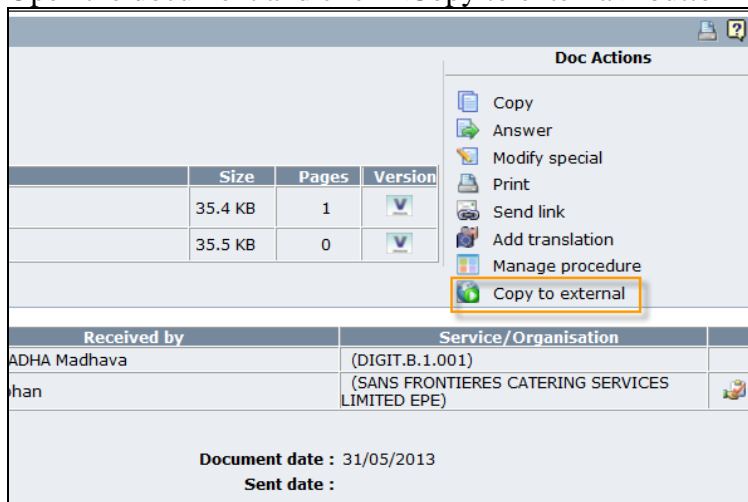
As described below, few Ares tabs and screens (ex: '*Document*' and '*Search*') have been modified to allow and display this copy to external:

²⁸ The PDF rendering is an asynchronous process. The system will automatically add the PDF content as soon as the rendering is completed.

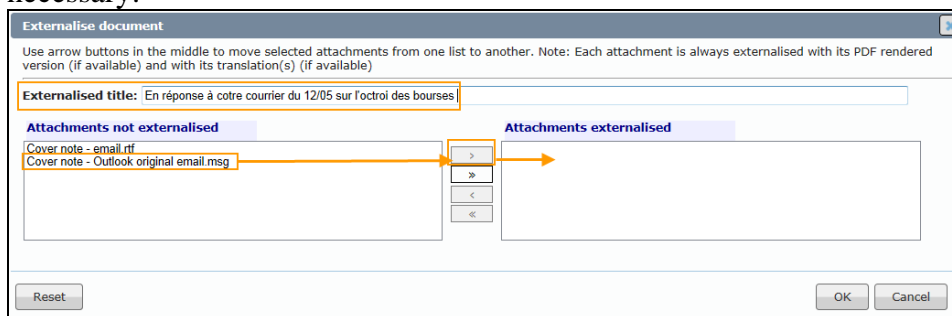
²⁹ DMO: you have a menu under 'Administration' menu that gives you the possibility to give access to 'copy to external' functionality. See 'Administration' manual for more details.

23.2.1. Managing the document copy to external




- (a) Open the document and click <Copy to external> button under *Doc Actions*:



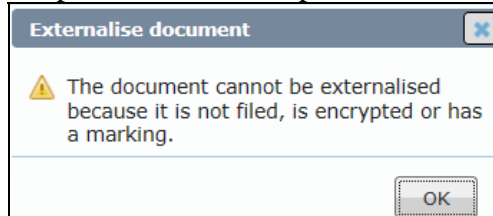
- (b) You can modify the title of the document before externalisation (ex: spelling mistake to correct, anonymisation reason...). Change it under 'Externalised title' field if necessary:



(The 'externalised title' is an additional metadata of the document. The original title is not externalised, only the externalised title is.)

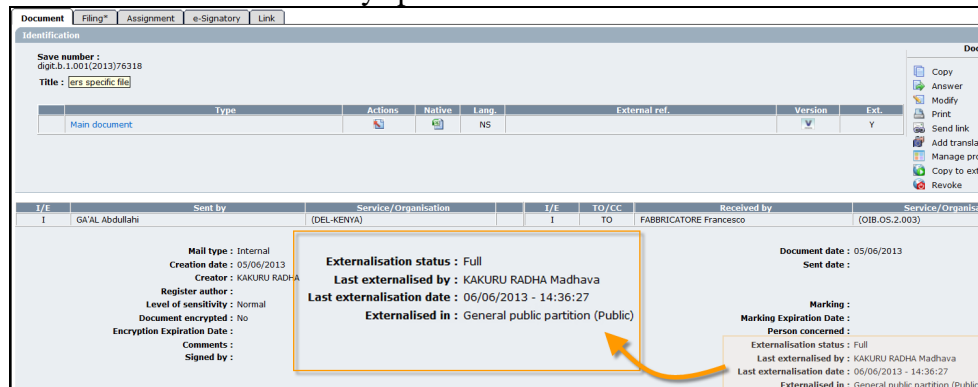
- (c) Choose the attachment(s) you wish to send to the external:
- Select the attachment on the left ('Attachments not externalised') and click  to put it for selection at the right of the screen. If you want to copy all attachments at the same time, click .
 - To cancel a selection, select the attachment on the right under 'Attachments externalised' and click . Click <Reset> button to cancel all modifications.
- (d) Confirm clicking <OK> button.
- (e) A few checks are performed:

- A warning message is displayed if you need to do corrections or if the copy is not possible. For example:



- If there are no problems, the copy is validated: document metadata and the required attachment(s) are made available to the client application.

- (f) 'Document' tab is updated with the 'externalisation' information (status, dates and type) The externalised title and the name of the partition where the doc is 'externalised' are also clearly specified in the document details:



Notes

- There is no automatic synchronisation following a modification: any update of a document in Hermes (ex: title or recipient modification, addition of a new attachment...) requires a new copy to external of the document in order to propagate the modifications to the External Repository. This is to prevent unexpected externalisation of sensitive information.
- If you have access to several partitions where to externalize the document, the system will perform a few controls on the externalisation partitions to respect the security. The number of partitions where to externalise is limited (the limit is defined by the business the user belongs to and can be adapted per document). If a user changes the partition of an already externalised document it will always be in the 'authorised' partitions of the business. If the change is done from a private to

public partition a warning is displayed:

Externalise document

Use arrow buttons in the middle to move selected attachments from one list to another.
Note: Each attachment is always externalised with its PDF rendered version (if available) and with its translation(s) (if available)

Externalised title:

Attachments not externalised

- AGRI politics in EU for the new PAC
- A word of the president (Cover letter)
- Prices in EU (Annex)

Attachments externalised

- Response letter (Main document)

External partition

Public

RESET OK CANCEL

23.2.2. Revoking a document

You can 'revoke' a document, i.e. cancel the copy to external. The document and its attachment(s) will be then deleted from ERS and the external access will be lost.

- (a) Open the document to copy to external and click <Revoke> button under *Doc Actions*:

Doc Actions

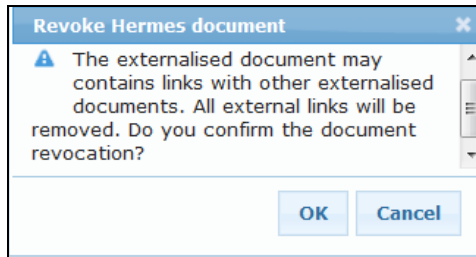
- Copy
- Answer
- Modify
- Print
- Send link
- Add translation
- Manage procedure
- Copy to external
- Revoke**

Internal ref.	Version	Ext.
		Y

Received by	Service/Organisation
FABBRICATORE Francesco	(OIB.OS.2.003)

Document date : 05/06/2013
Sent date :

- (b) Confirm with <OK>:



23.2.3. Searching and downloading a document copied to external

Any linked client application can search and download the documents if they have a valid ECAS authentication and the requisite rights. The client applications may control the access of those documents (private, public...).

The search and consultation of these documents will be available soon through some client applications like Sygma, DocsRoom, Carol...

24. ANNEXES

24.1. List of action codes

ASSIGNMENT (assignment specific codes)

CODE	Libellé
CF	Chef de file / Lead department
ASOC	Service associé / Associated Service
INFO	Pour information / For information
CLASS	Pour classement / For filing

E-SIGNATORY (E-signatory specific action codes)

CODE	Libellé
RED	Rédacteur du texte / Writer of the text
CONTRIB	Pour contribution au texte / For contribution to the text
VISA	Pour visa ou paraphe / For visa or initials
SIGN	Pour signature / For signature
EXP	Pour expédition et enregistrement / For dispatch and registration

24.2. Markings summary

Commission interne Commission internal		Information of a sensitive nature which is limited to use within the Commission (not to be sent to EEAS nor to the Executive Agencies)						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission	NO	Commission	NO	No	Yes	Yes	Yes	Rapports d'audit

Limité Limited		Information which is sensitive and limited for use within the European Union institutions, other offices and agencies established by virtue or on the basis of the Treaties, EU Member States and public administrations. This marking doesn't restrict the visibility of the document.						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	NO	Commission, agencies, EEAS	NO	No	Yes	Yes	Yes	Documents provenant du Conseil qui portent ce marking

Limited ETS Joint Procurement		Marking to be applied to all documents handled in the context of the implementation of the auctioning of emission allowances under the Emission Trading System Directive in accordance with the Joint Procurement Agreements to procure Common Auction Platforms or to procure an Auction Monitor, whenever such documents contain information covered by the obligation of professional secrecy within the meaning of Article 339 of the Treaty on the Functioning of the European Union. Users must encrypt these documents; access to attachments from delegates and virtual entities is restricted.						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	Yes	Commission, agencies, EEAS	Yes	Yes*	Yes	Yes	Yes	Documents sur la mise aux enchères de quotas d'émission

*The virtual entities and delegates can access the document, but not the attachment. They can only see the attachment by assigning them a task (eg. INFO).

Limité Groupe Limited Group		Only for use within the nominated Service/Unit/Group (only the users of the nominated group may read documents with this marking).						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	Yes	Automatical	NO	No	Yes	Yes	Yes	Réponses aux demandes de consultation concernant l'application du Code de Conduite des Commissaires.

Secret Médical Medical Secret		Only to be used by the Medical Services (HR), the joint sickness insurance service (PMO) and the EEAS (to authorise producers, distribution and archiving).						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Only HR, PMO, agencies, EEAS	Yes	Only HR, PMO, agencies, EEAS	Yes	No	Yes	Yes	Yes	Avis médicaux, résultats d'analyse, procédures d'invalidité, congés spéciaux, aides psychosociales, demandes d'aides ménagères,... Réclamations Article 90 liées au domaine médical.

Affaire du personnel Staff Matter		To be used only for documents related to staff matters and managed by staff of personnel departments (HR and resources unit of the DG in question) and management concerned.						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	Yes	Commission, agencies, EEAS	Yes	No	Yes	Yes	Yes	Recrutement, prolongations contrats, retraite, mutation,... Réclamations Article 90 (sauf celles liées au secret médical) et les plaintes déposées auprès du Médiateur européen. Demandes faites au titre de l'article 16 du Statut (activités des fonctionnaires après cessation des fonctions).

Données à caractère personnel Personal data		Shall be applied to documents containing personal data that shall only be communicated on a need to know basis pursuant to Regulation (EC) No 45/2001 and that do not fall under the scope of another approved marking (this marking doesn't restrict the visibility of the document).						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	NO	Commission, agencies, EEAS	NO	No	Yes	Yes	Yes	Curriculum Vitae

Strictement personnel Personal		Marking used to indicate that the document should only be opened by the addressee(s) (only the stakeholders of the document (creator, sender(s), recipient(s) and assignment and e-signatory actors) have read access).						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	NO	Commission, agencies, EEAS	NO	No	Yes	Yes	Yes	Documents très sensibles pour lesquels il n'y a pas d'autre marking disponible et dont l'accès doit être restreint aux seules parties prenantes pendant une période limitée. Timbre le plus restrictif. A utiliser avec une date d'expiration.

Embargo jusqu'à Embargo until		Marking used to indicate date/time before which a document may not be published. This marking doesn't restrict the visibility of the document.						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	Yes	Commission, agencies, EEAS	NO	No	Yes	Yes	No	A utiliser pour signaler que le document ne peut pas être publié avant une certaine date.

Enquêtes et affaires disciplinaires Investigations and disciplinary matters		For data linked to the administrative investigations of IDOC and to related questions treated by the relevant services of the SG.						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	NO	Commission, agencies, EEAS	Yes	No	Yes	Yes	Yes	Demandes d'ouverture d'enquête, rapports auditions, décisions de sanctions,... Note du SG aux autres DGs pour transmettre des informations liées aux enquêtes internes de l'OLAF, aux enquêtes administratives de l'IDOC et aux procédures disciplinaires.

Mediation Service Matter		Marking for use by services who need to have an exchange of correspondence relating to personnel matters with a specific degree of confidentiality. To be initiated only by the Mediation Service, the Director and Heads of Unit of the PMO, the Director General, Director and Heads of Unit of DG HR, the Director General of the Legal Service and the Director of Human Resources in other DGs or services.						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	Yes	Commission, agencies, EEAS	Yes	No	Yes	Yes	Yes	Documents relatifs aux cas traités par le Service de Mediation de la Commission.

Avis du Service Juridique Opinion of the Legal Service		Legal advice given by the Legal Service to be considered as an information, indication, advertisement or advice for the addressee(s) to treat the document as a document which should be known or kept by the addressee(s).						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Only SJ	Yes	Commission, agencies, EEAS	Yes	No	No	Yes	No	Avis du SJ en réponse à des consultations; notes du SJ qui sont exprimées ou envoyées par l'initiative du SJ à des DG ou Commissaires.

Documents de procédure juridictionnelle Court procedural documents		Court procedural documents drawn up by the Commission's Legal Service or other parties in the framework of litigation and court cases before the EU Courts, national or international Courts to be considered as an information, indication, advertisement or advice for the addressee(s) to treat the document as a document which should be known or kept by the addressee(s). Access to attachments from delegates and virtual entities is restricted.						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Only SJ	Yes	Commission, agencies, EEAS	Yes	Yes*	No	Yes	No	Actes de procédure rédigés par le SJ et documents en provenance des trois juridictions.

*The virtual entities and delegates can access the document, but not the attachment. They can only see the attachment by assigning them a task (eg. INFO).

OLAF Investigations		This marking should be applied to all OLAF operational information (only metadata may be registered and the subject of the document must be replaced by the standard phrase "Document under Decision 844/2001" with the OLAF File (OF) number where appropriate).						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	NO	Commission, agencies, EEAS	Yes	No	Yes	No	Yes	Documents liés aux enquêtes OLAF.

OLAF Investigations - Special handling		This marking should be applied in exceptional circumstances to highly sensitive OLAF operational information (only metadata may be registered and the subject of the document must be replaced by the standard phrase "Document under Decision 844/2001" with the OLAF File (OF) number where appropriate).						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	NO	Commission, agencies, EEAS	Yes	No	Yes	No	Yes	Documents liés aux enquêtes OLAF particulièrement sensibles.

COMP Operations		Marking applied within the marking scheme for DG COMP Antitrust, Mergers, State Aid and other proceedings. Access to attachments from delegates and virtual entities is restricted.						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	Yes	Commission, agencies, EEAS	Yes	Yes*	Yes	Yes	Yes	Documents relatifs à tous les instruments de décision de COMP sauf Antitrust et amendes.

The virtual entities and delegates can access the document, but not the attachment. They can only see the attachment by assigning them a task (eg. INFO).

COMP - Special handling		Upgraded marking for more sensitive documents applied within the marking scheme for DG COMP Antitrust, Mergers, State Aid and other proceedings (only metadata may be registered and the subject of the document must be edited so as not to reveal any of the sensitive information).						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	Yes	Commission, agencies, EEAS	Yes	No	Yes	No	Yes	Documents relatifs aux décisions d'inspection (Antitrust) et amendes.

EU Satellite Navigation Matters		Marking to be applied to sensitive documents in the context of the EU Satellite navigation project.						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	Yes	Commission, agencies, EEAS	Yes	No	Yes	Yes	Yes	Documents opérationnels relatifs au projet "EU Satellite Navigation"

Question de sécurité Security Matter		Marking to be applied for sensitive security matters managed by HR.DS (the use of the marking can only be initiated by HR.DS; only metadata may be registered).						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Only HR	Yes	Commission, agencies, EEAS	Yes	No	No	No	Yes	Agenda des Commissaires lors des missions dans les Délégations.

IAS Opeations		Marking to be applied to operational documents handled in the context of IAS audits, consulting engagements and risk assessments.						
Apply		Read		Delegates/VE access restricted	Reply allowed	Attachments	Expiry date	Example
Who can apply?	Manageable by the DMO?	Who can read?	Manageable by the DMO?					
Commission, agencies, EEAS	Yes	Commission, agencies, EEAS	Yes	Yes	Yes	Yes	Yes	documents handled in the context of IAS audits, consulting engagements and risk assessments

*The virtual entities and delegates can access the document, but not the attachment. They can only see the attachment by assigning them a task (eg. INFO).