ARES Advanced Records System

User Guide

Ares 3.7.1

User guide v 8.2

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1. WHAT IS ARES?

1.1. Ares in a nutshell

Ares is the common information system used by all the Commission's Services, the Cabinets, EEAS, the EU delegations, the executive agencies and other institutions such as the Service of the European Ombudsman, agencies like BEREC, EU-Lisa... for registering and filing the official documents of the Commission in the same electronic common repository. It follows the e-Domec rules for Document Management.

On top of registration and filing, Ares offers multiple functionalities, such as creation of workflows, e-signatories, full-text searches, security management... Ares is interfaced with the NomCom application (filing plan of the Commission and all DGs) which facilitates the operations of filing. In Outlook an <AresLook> button connects Outlook to Ares since it allows end-users to register and file e-mails in Ares.

1.2. Where to find useful information about Ares?

For e-Domec procedures and many interesting information about guidelines, check the related SG website: Records management & archival policy (e-Domec) (europa.eu)

Check also the DIGIT HAN Support wiki: Home page of HAN project - HAN - EC Extranet Wiki (europa.eu)

You can find there all the users guides (this documentation guide focuses on Ares. You can also read NomCom's and too), but also Quick Reference Cards, information about the trainings on Ares, Frequently Asked Questions and many more.

💡 Do not hesitate also to subscribe to our Ares Newsletter and receive monthly tips and tricks, useful information about latest releases and many more: DIGIT - Manage My Newsroom Account (europa.eu)

AresTV is another interesting tool. We propose many educational HAN related videos: AresTV - HAN - EC Extranet Wiki (europa.eu)

Throughout this user guide, the icon is shown when there is a matching AresTV. A direct link to the video in EU learn is provided.
2. ACCESSING ARES

2.1. Connecting to Ares

2.1.1. How to connect to Ares?

Context
Ares has a web-type user interface, requiring an EU login authentication.

Method
(1) Launch your web browser (Internet Explorer for instance).

(2) Enter the address https://webgate.ec.testa.eu/Ares

(3) The EU login homepage asks for authentication. If you are not yet connected to an EU login application, enter your email address.

(4) Click on button.

(5) Type your EU login password.
(6) Click **Sign in** button.

(7) You are then connected to Ares with your own login, first and last names.

### 2.1.2. How to log out from Ares?

(1) Click on the arrow next to your name at the top of the screen.

(2) Select the **Logout** button:

(3) Confirm:
You can choose whether to stay connected through EU login or to be completely disconnected:

Notes

- Since 2017, Ares and Nomcom use the more secure HTTPS for data communication in their hyperlinks, rather than the older, unsecured http protocol which does not encrypt data. Since that date, we automatically redirect from the old address to the secure one. Because all document URL links since 2017 use https and to optimise performance, the automatic redirection has been stopped. Please update your old bookmarks (if you have such) if they are still pointing to the former http address since these will not work anymore.

- If you are already authenticated on EU login to another application that uses this service, you will not be asked to authenticate yourself again.

- You can use a different authentication method. Check EU login information on DIGIT Service catalogue for info.

- You can access Ares remotely. Details here: https://webgate.ec.europa.eu/fpfis/wikis/x/HrjGCw

- For data protection reason, the timeout of the application occurs after 30 minutes of inactivity.

2.1.3. How to change the role displayed when connecting?

---

1 HTTPS stands for Hypertext Transfer Protocol Secure. It is the encrypted version of HTTP, an application protocol to transfer resources across the internet. It is most commonly used for transferring data from a web server to a browser to view web pages.
By default, you are automatically connected with your own account, with your own first and last names. However, you can do actions on behalf of a person (who previously gave you a delegation) or a virtual entity you belong to.

1. Click on the arrow next to your name at the top right of the screen and select the radio button representing the relevant role: your own role (EU login user), a virtual entity you are a member of, the profile of a person who gave a delegation to you or to the virtual entity you belong to. Click on the corresponding link:

2. 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 Document menu belonging to the virtual entity in question. You can now perform certain actions, determined by the profile or the virtual entity. A single user can have different profiles depending the role s/he’s using, her/his own or a virtual entity’s.

3. When you are connected with a delegation or a virtual entity, the toolbar colour is changed accordingly. You can then quickly check which profile you are working on:
(4) You can also specify a default role: this role will then always be displayed directly after the EU login authentication. For example, if you want to connect directly to the virtual entity of your secretariat, you do not need to go through your own login first. Click the **Set as default** button, then confirm:

![Set as default button](image)

(5) You can see your default role under the menu *Preferences*, in the tab "Main":

![Preferences](image)

2.2. **Home page**

2.2.1. *What do you see on the home page?*

**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:

- **e-Signatory**: displays all your e-signatory tasks
- **Assignment**: displays all your assignment tasks
- **Received documents**: displays all the registered documents where you are indicated as a recipient
- **Get started by creating a/an**: new document or an internal message
- **Search criteria/ Advanced search**: gives you access to the detailed search for documents, files or tasks

### 2.2.2. Ares menu

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 the arrow\(^2\). The menu gives you access to the following information:

\(^2\) Click on the arrow again to "maximise" the menu.
You can create a document via [Doc] button or create a new internal message via [Msg] button.

In Document are displayed all the tasks assigned to you, the registered documents where you are indicated as recipient and the list of the last 200 documents you have opened. You can also create the list of your 200 favourite documents.

The File menu allows you to manage your favourite files where you can add documents directly to the relevant files and to search files of your service. The filing plan offers a direct access to your headings and files. You are offered a direct link to NomCom to directly open the concerned elements.

The Follow up menu displays all tasks you, all non closed tasks assigned to the users from your unit / direction or DG, external transmissions and available reports (according to your rights).

The menu Administration is different according to your profile. For tasks requiring administrator rights, see the manual for administrators. By default, everyone can unlock documents, create/modify distribution and workflow lists and search/create external entities.

### 2.2.3. What buttons on the top right of the screen are there for?

At the top right, there are several hyperlinks, available from every Ares screen:

- ![User Service Manager](image)

  - ![Profile](image) allows you to connect as a virtual entity or under the profile of somebody who would have given you his/her delegation. Your current connection profile is shown.

  - The **EN/FR** (French/English) buttons allow you to quickly set and change the interface language for the current session.

  - **Preferences** allows you to define your personal options, such as language of the application, start page, delegation choices and even the Adonis/Ares parameters.
– **Help** gives you access to Ares (and NomCom) online documentation available from Digit Ares Support Wiki. You are also offered useful links as the link to register to a training. You are also provided with the link to the "privacy statement".

– **News**: when a new release is to be deployed with major changes/features or when an important information is to be known, a news pop-up is displayed upon Ares connection. It presents the major release improvements and changes, a link to the complete documentation, to an explanatory movie and to Digit Ares Support wiki. You can also rate the movie you have watched.

When you do not want that pop-up to be launched automatically, tick the button <Close and no longer show>. You can still view it again, at any time, from **News** menu at the top right of the screen.

![Image of QUOI DE NEUF DANS ARES?](image)

– **AresTV**: direct link to AresTV on the home page. It offers you fun explanatory movies about several Ares and NomCom features. Do not hesitate to click it regularly!

– **Go to Nomcom** provides direct access to the NOMCOM 3 application.

**Notes**

- If you click on the Ares logo (on the top left of each screen) you are redirected automatically to the application homepage (except when you are creating/ modifying a document).
Informative and warning messages will be shown at the top of the screens whenever Ares will be unavailable for deployment, maintenance ...
3. **PREFERENCES**

3.1. **Set your 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, s/he cannot access the **Preferences** menu of your profile. A delegation does not allow the other person to modify your preferences.

3.1.1. **How to define your language and display options?**

**Method**

1. Click on **Preferences** at the top right of any screen.

2. This automatically takes you to the "Main" tab, in **reading mode**.

![Image of Preferences settings](image-url)
(3) This tab helps you to set the main Ares options. You have to click the **Edit** button to modify your parameters. You can then select the options you need either from the radio buttons or from the dropdown menus. If a radio button is highlighted in light blue, it means it is has been selected:

![Options and settings](image)

- **Default role**: You can specify a default role. This role will then always be displayed directly after EU login authentication. For example, you want to connect directly to the virtual entity of your secretariat; you do not need to pass by your own login first. [More details? See chapter 2.1.2](#)

  **Interface display**:

- **Start page**: homepage selected automatically on connection. Choose the page from the dropdown list menu.

![Start page options](image)

- **Language**: language of the application when connecting to Ares ("French" or "English"). Select the language: 

  ![Language options](image)

- **Left menu**: "Normal" shows the default display of the left menu. Select "Advanced" to expand it.

  ![Left menu options](image)
- **Narrow search**: allows you to enable/disable the "narrow result" panel for the search.
  
  - **Document creation**: to specify if you want the additional fields below to be always open when you are in the document creation window: Extended Screen. By default, the document creation window's form is set to Compact Screen.
  
  - **Document details**: to specify if you want the additional fields below to be always open when consulting a document details: Extended Screen. By default, it is set to Compact Screen.
  
  - **Registration confirmation**: An Ares document is registered right after clicking on the button which triggers a last confirmation message. If you do not wish to see this warning each time you register a document, you can disable it selecting: Disabled.

![Main interface](image)

**Document details:**

- **Assignment tab/assignee service**: the assignments display filters are now customised for each user, meaning you are proposed the different levels linked to your own situation and presented the name of your DG, directorate, service and section (if applicable). "All" displays all the document assignments. Your directorate is selected by default- you can change it.
• **e-Signatory visibility**: set the parameter for the default access of your e-Signatories after registration. “Restricted” (default option): your e-Signatory will be accessible only by the document creator and the e-Signatory actors/managers. “Extended”: all users having access to the document will be able to see the e-Signatory. The chosen option applies automatically on all the new e-Signatories you will create after saving those preferences (not on former documents; please modify those manually if necessary on the corresponding e-Signatory tab).

**File:**

• **My service/Lead department**: type the service that would be used by default in files searches (including searches done from the left entry menu "My service"). You can also request to display all the files of your unit in the preferences. Use the operator you need from the drop-down menu (Be aware that it may affect the system performance). <Include CFA>: when ticked, will take also into account "Associate Lead Department" value ("Chef de File Associé") in the search.

• **Favourites grouping/sorting**: the files may be gathered by heading decimalisation, specific codes, file owner or desk officer. The files may be sorted by file title, specific code, file owner or desk officer. The sorting/grouping can be chosen directly from the Favourite files menu.

**Adonis:**

• If you wish to perform documents searches in an Adonis database, insert your login, password and choose your DG database from the list

**CNS Preferences:**

• The button leads you to the CNS preferences in order to parameter the sending of notification emails. [More details? See chapter 3.1.4]

(4) Click on button to confirm your selection.

**Note**
You are warned when the user/virtual entity you have selected as "default role" no longer exists (for example, if the person has left the Commission, the virtual entity was deleted...)
3.1.2. How to delegate your complete Ares profile and its consequences?

**Method**

1. Click on **Preferences** at the top right of any screen.

2. Click on the tab "**User delegation**":

```
Main User Delegation Task 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. Click **Create Delegation** button.

4. Parameter your delegation options for a person/virtual entity:

```
Create a delegation
```

```
User: [Redacted]  From 19/06/2020  To 19/08/2020

This delegate has the following permissions:

**Permissions to sensitive data**
- May have consultation and creation permissions to documents with a level of confidentiality "Sensitive Non Classified"
- May have consultation and creation permissions to documents with a level of confidentiality "RESTREINT UE/EU RESTRICTED" or "EU/A Restricted"

**Time limitation**
May only have access to documents with the creation date (for saved documents) or the registration date (for registered documents) superior or equal to 19/06/2020 (up to 3 months before the date of assignment to your current job)

Save  Cancel
```
(a) Type the name of your delegate using the autocomplete (either a person or a virtual entity).

(b) 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 in the field 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...).

(c) Tick the permissions (rights access) you wish to give to your delegates:

- **Permissions to sensitive data**: you can limit your delegates' access to some documents.
  - **Sensitive Non Classified**: when this box is ticked, your delegates can see and create documents with a confidentiality level "Sensitive Non Classified"
  - **RESTREINT UE/ EU RESTRICTED**: when this box is ticked, your delegates can see and create documents with a confidentiality level RESTREINT UE/ UE RESTRICTED

- **Time limitation** delegation is useful for your current activities in your daily work: a delegate receives access to the documents whose registration date (or creation date for only saved documents) 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, modify the Date field.

None of the boxes is ticked by default: delegates with no access to documents bearing the confidentiality level "Sensitive Non Classified" and "RESTREINT UE/ EU RESTRICTED" have not access to the documents created prior to the start of the period of delegation.

(5) Click on **Save** button to validate the delegation.

![Delegations](image)

**Note**
A virtual entity cannot delegate its own profile. When you are connected with the role of a virtual entity in Ares, the tab “User delegation” is greyed out. A user can of course delegate her/his profile to a virtual entity.

3.1.3. How to delegate automatically certain types of tasks you receive?

1. Click on Preferences at the top right of any screen.

2. Click on the "Task delegation" tab:

   ![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.

3. Click the Create Delegation button

4. Fill the fields:

   ![Create a Delegation]

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

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

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

5. Click on **Save** to confirm your selection.
Notes

- You cannot automatically delegate the Q-SIGN and QES-OUT/IN tasks through a task delegation (under the “Preferences” tab). Those codes are not available in the list.

- 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, an error message is displayed:

  Can not create 2 delegations of the same task with an overlap of time.

- button: to modify an existing delegation.

- button: to delete a delegation.

- 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 that you wish to delegate manually, use the button on the "Assignment" tab page.

- 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 dates of the delegation that is going to expire appear in orange, with an explanatory tooltip:

  Delegations

  The delegation will expire in less than 30 days

  CNS also sends notification emails

- If the delegation is not extended, it will be automatically deleted and a warning notification is sent.
• A delegation is deleted if one of the following rules 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 delegee 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 delegee 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 delegee go both to the same service, the delegations will be suppressed. In case of reorganisation, contact DIGIT ARES MIGRATION before the reorganisation.

3.1.4. How to be informed by email of the new elements in Ares?

CNS button enables you to customise the notifications you can receive either from CNS (Corporate Notification System). CNS is a corporate application designed to manage email notifications coming from various applications in the Commission. For more details check CNS full documentation: https://webgate.ec.europa.eu/fpfis/wikis/display/DIGITB2Support/CNS+-+Corporate+Notifications+System
4. ACCESS RIGHTS AND SECURITY

4.1. Access rights and available options in Ares

In Ares, you must make a distinction between the possibility to do an action on a document and the right to do it on a specific document/file. Indeed, being able to perform actions on a document is also closely linked to your access rights on the document itself. For instance, you may only modify a document if you are the document’s owner or if you have the current e-Signatory task on this document.

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 by the DMO.

Ares uses "profiles", which group together a set of actions that can be performed. Summary of all Ares available profiles:

To read the summary: a person with a “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 personal, unit and direction level) and visualise the deadlines.
Using operational groups helps you to follow the "need to know" principle, 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.

As agreed with DMOs, the service providers’ staff (intra and extra muros) for all DGs will by default be automatically put in the group "No Ares access". If an external provider should access Ares, his/her DMO should now take him/her out manually from that profile and assign him/her another Ares profile. (Check the Ares “Administration” guide to know more about profiles management).

4.2. Restricting the access to a document

4.2.1. How to choose the confidentiality level of my document?

Context
The security is very important in Ares. It ensures that the information is properly categorised and handled in order to reduce the risk of information leaks and loss. Each document must receive a sufficient and appropriate level of confidentiality. This ensures that everything processed in Ares is protected to the required degree. Security rules are defined.

You can restrict the access to a document via the filing (if you restrict the access to the file readers) or put a restriction directly on a document (for instance when choosing a confidentiality other than “Normal”).

Should you apply a marking or file the sensitive document in a limited file?

If a document contains sensible information, it is legally compulsory to add a marking on it, regardless of the visibility of the file. The sensible document security is clearly visible at the top, above the document title.

If your document contains sensitive personal data, you can use the related in your document (without a marking). Check chapter 4.2.6 for more details.

If you only limit the access to the document through the filing: if your document is filed in another file, which is accessible to the whole Commission for instance, your document will be...

---

visible. The file security is also more volatile. Indeed it is quick and easy to modify it, whereas modifying a document with a marking.

The **document stakeholders** (creator, sender(s), recipient(s) and the workflow actors: assignment and e-Signatory) can always see the registered document, whatever the marking is.

There are four levels of confidentiality levels in Ares:

- **Normal** (default option): for any non sensitive document, for “Commission use”, as described in the document C(2019)1903, executive agencies included. For any EU organisation using HAN⁴, the visibility is only authorised within their organisation.

- **Sensitive Non Classified** (SNC): (replacing Handling restriction). Information or material the Commission must protect because of legal obligations and/or because of its sensitivity. The unauthorised disclosure could damage the document stakeholders or the EC as a whole, but which cannot cause damage to the EU or to the Member States' interest.

- **RESTREINT UE/ EU RESTRICTED**: the unauthorised disclosure of which could be disadvantageous to the interests of the EU or of one or more of the Member States.

- **EURA-Restricted**: may only be applied on documents related to nuclear safety (Euratom treaty) and is only for use by DG ENER in Luxembourg.

A 5th sensitivity level « Publicly available » is automatically given to PAV documents (linked to a finalised Access to Documents request). This level cannot be selected by the user when creating/ modifying a document. See chapter 14.4 for more details about the PAV.

**Method**

1. When encoding the document metadata, go to the field “Confidentiality level”.

2. From the dropdown list, select the required level of confidentiality from the three available:

3. According to the confidentiality level chosen, options might be available. Read the details in the coming chapters.

⁴ For instance, the European Ombudsman, agencies such as BEREC, EMSA...
4.2.2. *How to indicate that my document is Sensitive (Non Classified)‽*

**Context**

If your document is sensitive because of legal requirements or because it contains personal data, you must restrict it, for instance with a marking. Examples of sensitive non classified documents: sensitive briefings, personal information, draft policies or speeches, unpublished financial information, legally protected information…. 

A document may also contain sensitive personal data, that do not imply a marking. A flag is available for this case: the “personal data » flag. [See chapter 4.2.6 for more details](https://webgate.ec.europa.eu/fpfis/wikis/download/attachments/110233543/Nouveaux%20Timbres.xlsx).

Please find a description of all the security markings on our wiki: [https://webgate.ec.europa.eu/fpfis/wikis/download/attachments/110233543/Nouveaux%20Timbres.xlsx](https://webgate.ec.europa.eu/fpfis/wikis/download/attachments/110233543/Nouveaux%20Timbres.xlsx)

**Method**

(1) Choose the confidentiality level “Sensitive Non Classified”.

(2) Select a security marking: “SENSITIVE” or “SPECIAL HANDLING”:

```
Confidentiality level: *Sensitive Non Classified*
Security marking: *SENSITIVE* or *SPECIAL HANDLING*
```

(a) SENSITIVE: the standard handling procedure applies\(^5\). In order to define the audience that must access your document, you can combine it with: (Those are mutually exclusive, meaning you cannot edit both simultaneously).

- a distribution marking (Security matter, Staff matter, Medical secret…): you give only access to the marking group members
- One or several service(s) (ex: DG CLIMA.A1…)
- a working group: list of persons working on specific projects. This list is created and managed by the DMO, in collaboration with the LSO

⚠️ The access to a distribution marking/group depends on your DG/ rights. Members of the distribution marking/service/working group have only access to the document if they also belong to the file readers of the document.

---

When used on its own, “SENSITIVE” is very restrictive as it gives only access to the document stakeholders.

(b) SPECIAL HANDLING must be used when stricter handling instructions apply. It is compulsory to add a distribution marking (such as OLAF investigations…):

(3) A marking expiry date, an “Unlimited” time frame or a marking expiry event may be added for some markings.

(4) The document security is clearly visible at the top, in the yellow-coloured banners, above the document title. The security is also shown in the document additional information:
Security instructions can be found by the hyperlink in the yellow banner. The same banners are shown on older documents with the label “Sensitive Non Classified”.

### Notes

- A document may receive only one marking at a time.

- ! The reduced visibility of a document with a marking applies to filed documents. Before the 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. If the security of a registered document should be modified the DMO/CAD must do it through the option "Classifications and marking" where he can declassify the document or edit the marking.

- If it seems no one has access anymore to a document containing only “SENSITIVE”, i.e. with no distribution marking, no service nor working group (for instance if all stakeholders left the EC), the DMO can open a ticket to Digit Ares Support through the helpdesk. If it is confirmed that the access is lost, the support can add an INFO task to the document.

#### 4.2.3. Which markings are available and for whom?

The security and distribution markings are not available to all users. Some markings are new, other markings are not available anymore. Check the corresponding at the end of this manual and consult the markings description on our wiki:

https://webgate.ec.europa.eu/fpfs/wikis/download/attachments/110233543/Nouveaux%20Timbres.xlsx
It is not possible any longer to apply/update a document with the old security values. The old markings are still visible for the already marked documents (with “Sensitive Non Classified” mentioned in the yellow banner) but will not be available when a marking should be edited/added.

Specific markings:


Then, if you have imported/scanned a file and you choose afterwards one of these markings, a warning message is displayed:

- For the following markings « SENSITIVE : Court procedural documents », « SENSITIVE : COMP operations », « SENSITIVE : IAS operations », « SENSITIVE : CLIMA » and « SENSITIVE : Pharma investigations ”: the 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.

- “Person concerned” option is available when you choose one of the following distribution markings: SENSITIVE: "Staff matter", "Medical matter" and "Investigations and disciplinary matters”.

- It is not possible to use external transmission for documents bearing the « SPECIAL HANDLING: CLIMA» and « SPECIAL HANDLING: Pharma investigations ».

4.2.4. How to classify a document?

Context
The classification allocates the appropriate level of security to prevent unauthorised disclosure of a document. It helps managing the level of confidentiality and the markings. Classification can only be put on restricted registered documents, with the level of confidentiality "RESTREINT UE/UE RESTRICTED" and "EURA-Restricted" without attachment.
Method

(1) Choose the confidentiality level “RESTREINT UE/ EU RESTRICTED”:

![Confidentiality level screenshot]

(2) You can also add a Classification expiry date or a Classification expiry event:

![Classification expiry details screenshot]

Notes

- Adding an expiry date means that the document will eventually lose its classification and will have a "normal" level of confidentiality once the expiry date has been reached. When the document is declassified by the system following an expiry date there will be no attachments added by the system. A new report is added to list all the documents that have been declassified by the system where there are no attachments. Users can use this list of documents to upload the required attachments.

![Additional information table]

- When a document is declassified, any classification is removed after review. The declassification must be authorised by the creator of the document/ the head of unit of the concerned service. When declassifying the document, inputting the name of the person who provided the declassification authorisation is mandatory. The user can optionally as well add proof documents on the declassification authorisation via the button where a link of type Declassification note will be created.
• Markings are not affected by the declassification. If a marking was added then the level of confidentiality will turn into "Sensitive Non Classified". In other words, if the document had a marking before the declassification then this marking will be still applicable post-declassification.

4.2.5. How to specify that a recipient is the person concerned on a document and its consequences?

**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. It also indicates (for example to the DMO) that this document shall not be filed in her/his DG (as the document is addressed to a particular person and not to a service).

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 distribution markings: SENSITIVE : "Staff matter", "Medical matter" and "Investigations and disciplinary matters".

⚠️ The only visible consequence of "person concerned" in a document is with a delegation. Indeed, even if the delegates have access to the sensitive documents, they cannot see the documents when the delegator is specified as “Person concerned”.

**Method**
(1) When you choose one of those markings ("Staff matter", "Medical matter" or "Investigations and disciplinary matters", the field “Person concerned” is enabled.

(2) A drop-down list proposes all the recipients of the document (To or Cc). Select the person concerned from the list. (If you do not want to choose a recipient, keep Not applicable-default value selected).
(3) After saving or registering the document, the person concerned will be visible in the identification of the document:

**Note**
If you do not choose a “Person concerned” and do not tick “Not applicable”, a blocking error message is shown.
4.2.6. How to indicate that my document contains sensitive personal data?

**Context**
The former “Personal data” marking is no longer available in Ares\(^6\). However, there is still a need to indicate when an Ares document contains sensitive personal data\(^7\) and guarantee an adequate level of protection for such a document. The document metadata called “Sensitive personal data” may then be used to indicate documents with sensitive personal data and to protect them adequately. The default protection is that this flag affects the filing of documents, as it adds a limitation to which files you can file such documents into, as explained below. **A document with the flag and a marking can be filed in any file** since the marking limits access to the document.

In principle, the following categories of personal data are sensitive and therefore have to be flagged (and marked where the file visibility in Ares does not sufficiently limit who can access them):

1. **Behavioural data** like an individual’s location information, traffic information, data on their personal preferences and habits, assessment of performance, appraisal reports, etc.
2. **Financial data** like an individual’s bank account references (IBAN and BIC codes), bank statements, debit/credit card numbers and PINs, VAT number, information about salary, pension or financial entitlement, expenses, investments, invoices, etc.
3. **Special categories of personal data** (art. 10 of Regulation (EU) 2018/1735: data revealing a person’s racial or ethnic origin, political opinions, religious or philosophical beliefs, or trade-union membership, genetic data, biometric data for the purpose of uniquely identifying a natural person, data concerning health or data concerning a natural person's sex life or sexual orientation;
4. **Personal data relating to criminal convictions and offences** or related security measures (see art. 11 of Regulation (EU) 2018/1725);
5. **Personal data of vulnerable categories of data subjects** (information specific to children, individuals with special needs, minority persons, etc.
6. **Operational data**: all personal data processed by Union bodies, offices or agencies when carrying out activities in the domains of judicial cooperation in criminal matters or police cooperation in the area of freedom, security and justice.

For all other categories of personal data, the person introducing a document in Ares should always carry out a case-by-case assessment of their sensitivity (i.e. depending on the context, additional categories of personal data than the ones listed above could be considered as “sensitive”).

**Method**

1. Set the “Sensitive personal data” flag when creating/ modifying a document or an internal message: the choices are “Yes”, “No” or “Unknown” (default value).

---

\(^6\) The “Personal data” marking did not restrict the document visibility when filed.

\(^7\) There is no formal definition of “sensitive personal data”. It is an operational term used to refer to categories of personal data that require an additional level of protection.
(2) The flag is visible in the document details and in the lists assignments, e-Signatories, received, favourite and recent documents:
Impacts on the filing:

In order to ensure the best protection for a document with the “Sensitive personal data” flag, setting this flag on a document has an impact on the filing: a document with the flag “Sensitive personal data” (and no marking) can only be filed in a file with reduced visibility. Filing rules and warning messages have been adapted consequently.

The system performs a visibility check on the coherence between the filing rules and the “Sensitive personal data” flag whenever a document is filed: for instance, if you try to file a document with the flag in a file with a wider visibility (i.e. in a file with “DG” or “Institution” visibility), you get a blocking message:

You cannot file a document containing 'Sensitive personal data' in a file with wide visibility. Please choose a red file ('Limited') or add a marking on the document.

You are also warned before actually trying to file the document:

Notes

- There is no link between applying a flag and a marking, except for the following specific markings where the proposed value for the flag will be “yes” (modifiable): “SENSITIVE: Investigations and disciplinary matters”, “SENSITIVE: Mediation service”, “SENSITIVE: Medical secret” and “SENSITIVE: Staff matter”.

- In order to be consistent, the system updates the flag “Sensitive personal data” present in the tab grouping all “Transparency” related properties of a given file. For active files with only HAN content:

---

8 These visibility rules do not affect ‘Blue’ PMO files.
- the file-level flag is automatically set to “Yes” when at least one document has the “Sensitive personal data” flag set to “Yes”,
- the file-level flag is automatically set to “Unknown” when at least one document has the “Sensitive personal data” flag as “Unknown”,
- the file-level flag is automatically set to “No” when all have the “Sensitive personal data” flag set to “No”.

- For files whose only content is outside the HAN repository (paper documents, documents in other repositories...), the file-level flag has to be updated manually. For files with HAN content and content outside the HAN repository, the system first calculates on the basis of the HAN content. If a file contains documents with the flag, you cannot change the security of the file.

- A temporary lock on the file (preventing any file modification) has been added. As a consequence, whenever you are trying to file a document with the “Sensitive personal data” flag but without marking, the file’s security cannot be modified. The system only locks while it checks the filing conditions.

- You can search for documents using the flag “Sensitive Personal data” in the advanced search, in the dedicated dropdown menu.

- The filing constraints and warnings are also shown when the DMO uses “Bulk operations” and “Mass Operations” tools.

- The documents that bear the former “Personal data” marking will not be impacted automatically by the new flag. If needed, the flag can be updated manually for certain older documents (by clicking “Modify/register” for saved documents or, exceptionally, via “Modify special” for registered documents).
4.2.7. How to encrypt the attachments of my document?

**Context**

You may need to (temporarily) encrypt Ares document attachments so their content is extra protected from unauthorised access. Encryption can be an effective way to reduce security breach risks stemming from unauthorised access to Ares document attachments directly on the servers, since encrypted attachments can only be decrypted by someone in possession of the decryption key. Without this key, the attachments are unreadable for someone that has gained unauthorised access.

Please note that the option to directly encrypt Ares document attachments inside the system:

- is applied to all attachments (originals and PDF renditions) of a saved/registered Ares document (at encryption, a deadline for the attachments’ decryption can be indicated). You cannot choose a specific attachment from all. The document metadata cannot be encrypted;

- does not impact access to these attachments for users that are authorised to access them. For these users, the system automatically decrypts them. Indeed, the document stakeholders (i.e. the creator, sender(s), recipient(s) and the workflow actors) and file readers (if there are) keep their access on the document and its attachments;

- is primarily intended for Ares documents with attachments that contain sensitive information and that (temporarily) require an additional layer of protection at infrastructure level. For all other Ares document attachments, the default system security measures and functionalities remain in force.

⚠️ The encryption functionality is not available by default to all Ares users. It can be authorised to a whole DG or a set of users (a service, a specific entity...). Please contact your DMO for more info. If necessary, s/he will open an incident to the helpdesk for HAN USM to request access.

**Method**

(1) When creating the document, check the box next to the ‘Encryption’ field:
(2) You may insert a deadline (optional) typing the date or through the calendar. At that date, the encryption will be erased.

(3) Save or register your document.

(4) The encryption is visible in the document additional details and in the list of documents (search results, received and recent documents…) with the icon 🗝️:
Notes

- In addition to this option, the system also allows that documents that have been encrypted outside of the system are added as an Ares document attachment. For these attachments, decryption will happen by the same external means as those that ensured their initial encryption.

- After registration of the document, the DMO of the person who registered the document may modify the encryption (under special exceptional circumstances) via the dedicated button: ‘Modify encryption’:

The other document metadata have to be modified with the ‘Modify special’ button.

- The encryption does not impact the search: encrypted attachments may be found in the search results (the access rights are maintained).

- It is not possible to encrypt attachments for documents with the sensitivity level ‘RESTREINT UE/ EU RESTRICTED’ as this level does not allow attachments.

- DMOs have access to a report ‘Documents registered by my service with an encryption due to expire’. See Ares Administration guide for more details.
5. **Creating an ARES Document**

5.1. **What is a document?**

For the purposes of this manual, "a document is any content independent of medium, which concerns the policies, activities and decisions of the Commission (or the concerned Institution/agency)". In other words, it does not matter if it is text written on paper or in an e-mail, sound registered on a tape, or pictures stored in an electronic format on a CD-ROM. No matter what type of information, what format, what physical support, as long as it concerns the work of the Commission, it is a document.

A document contains metadata and attachment(s). The attachment format evolves depending on the document status. See chapter 5.3 for more details about the attachments.

The document status may be different, along its lifecycle in Ares. When a document is active, it can be "saved” or “registered:

- a **saved document** is a document in the preparatory phase (a draft). It is modifiable by the authorised users. Only the title is compulsory when creating it and it is not compulsory to file it. It is only accessible by its creator and, if so, the persons who have received a task on it (e-Signatory or assignment). You may also generate an e-Signatory validation workflow on a saved document. A saved document receives a **saved number** starting with the creator’s service, the creation year and a sequential number. For instance, echo.b.3(2021)12789. See the following chapter to see how to create a new document.

- a **registered document** is finalised and approved. It cannot be modified anymore (except by the DMO, under special circumstances) and must be filed. It has a **registration number** starting with Ares, followed by the creation date and a sequential number (different from the save number’s): Ares(2020)45932. Many metadata are compulsory when creating it. See chapter 5.5 for more details.

As the case may be, you can directly register the document or first save it. A document may also be **frozen, transferred or eliminated**: for instance if the file(s) he is filed into is transferred to the Historical archives or deleted. Check the summary table of the rights on documents, in the annexes of this user guide, chapter 15.2

5.2. **ARES Document Metadata**

5.2.1. **How to encode the metadata to create a new document?**

**Context**

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9 Regulation (EC) No 1049/2001, article 3. The following media are explicitly mentioned: written on paper; stored in electronic form; sound, visual or audio-visual recording. FromSGe-Domec.
How to create a document in Ares, complete the different fields of the document, add an attachment to the document.

For a clear definition of a « document », check chapter 1.1

**Method**

(1) Click on the button on the home page or click on the button in the left navigation Menu.

(2) This gives you the entry screen allowing you to create a new document:
Press the [tab] key to jump from one field to another.

(3) If you should insert an attachment at this stage, see chapter 5.2.

(4) From/ To/ Cc: enter the sender(s), recipient(s). Simply type what you know about the entity you are looking for and then select it from the drop-down list or launch a search. You can also insert a distribution list.

You can use a virtual entity as recipient/ sender of a document. However, if this virtual entity contains no members, no one can follow up. That is why the system warns you with an orange icon if you are trying to insert an empty virtual entity:

(5) You do not need to select the document type (incoming mail/internal mail/outgoing mail), this is calculated automatically by the system based on the sender(s) and recipient(s) you have entered:
You can provide the different dates (Document date, and also Received/ Sent dates available from option) according to the document format: those dates are optional and might be hidden by the system after registration (see the table above). Based on the mail type, the system displays Sent date or Received date on the document details:

- **Sent date**: when the mail type is Outgoing, Internal (or Inter-institutional), Note to the file.
- **Received date**: when the mail type is Incoming, External or Other.

If necessary, type the date manually (DD/MM/YYYY) or click in the field for an interactive pop-up calendar. If you double-click, you add the date of today.

(7) Enter data in the Title field manually or copy & paste (max. 255 characters, incl. spaces). Make sure it reflects the document's content.

(8) If needed, indicate whether your document contains sensitive personal data (see chapter 4.2.6 for details) and/or choose a level of confidentiality other than” Normal” and/or Marking (see chapter 4.2)

(9) Additional information: clicking the option gives access to two additional fields:

---

10 In your Ares Preferences, you can specify if you want the additional fields to be always open when creating and/or modifying a document. See chapter 3.1.1 for more details.
• Comments (maximum 1000 characters including spaces).

• Sent/Received date

(10) You can file your document now or later. Filing (or assigning a filing task) is compulsory at registration. More details about the filing? See chapter 12.

(11) Confirm your data by clicking on save button.

(12) The document metadata is summarised in the “General” tab:

The document receives a save number with the name of your department (DG), year of creation and an incremented number.

The creation date is recorded automatically by the system.

💡 If you have a ‘Base’ profile that prevents you from registering or if you do not know how to launch an e-Signatory, you can create an automatic follow-task on the document for more details.

5.2.2. How to delete a recipient or modify the order of recipients?

Click the button behind each name to delete a single entity. When you have more than 5 recipients, the button enables you to delete them all at once:
You can drag and drop the entities to change the display order or move them, e.g. from sender to recipient or from To field to Cc…

**Notes**

- Special characters are authorised in the titles of documents. For example, if you insert a semi-colon, a question mark or a coma, the system will keep it after saving/registering. However, newline, carriage return, null character and tabs are replaced by a space. Control characters are still automatically removed (ex: unreadable characters).

- **Cancel** button allows you to delete all the fields of the document, including the attachment(s).

- If one of the mandatory fields does not contain the required data, an error message appears when you try to save:

5.2.3. **How to copy the metadata of a document to create a new one?**

**Context**

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

You can choose the format of your reply (a “document” or an “internal message”) and you can decide the metadata to be copied. The `<title>`, `<sender>`, `<recipients>` and the `<filing>` are ticked by default but may be unticked manually:

- "General" 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)

– Attachment(s): choose the type of attachment to copy. You can include or not the linked translations (Copying attachments is for example useful in case of framework contracts containing several identical annexes).

⚠️ The following metadata are never copied: assignments, dates, FWUP e-Signatory tasks.

**Method**

1. Press "Copy" at the top right, under the Actions button of the document:

2. Tick the metadata you would like to copy:
(3) Click the Copy button to continue or Cancel to stop the process.

(4) Fill in the fields of the new document (you can modify each field).

(5) Then click Save or Register and send.

Notes

- It is not allowed to copy the attachments of an internal message.
- Changing the format is not allowed when you try to copy a “document” containing external entities into an “internal message”. You also cannot copy an e-Signatory and/or attachments of a “document” into an “internal message”.
- E-Signatory: if the original document was registered directly after the copy, the e-signatory cannot 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, s/he will be automatically deleted during the copy.
- The linked documents you do not have access to will not be copied.
- You can also only copy some metadata of the document and put them in the clipboard. Click Copy metadata in the tooltip available in each list (received and recent documents, tasks inboxes, favourites).
Then use Windows "paste" function to copy the metadata in an email, a Word document...

5.2.4. How to create a document from a favourite file?

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

**Method**
(1) Click on **Favourites** in the **File** menu.

(2) A screen listing your favourite files is displayed:

![Screenshot of Ares software displaying favourites]

(3) Click on **Actions** under the file from which you would like to create a new document.
(4) Select **Add a new document**.

(5) This gives you the entry screen allowing you to create a new document. More details about the creation of the new document? See chapter 5.

(6) Click **Save** or **Register and send**.

(7) 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.

**Notes**
- Click on **»** to view the detailed contents of the file.
  
  - (a) : file or sub-file
  
  - (b) To see the documents filed in the selected file (or sub-file), click **View content** under **Actions**.

The documents and their details are listed and you can navigate through the results by clicking the arrow.
• 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 under then View content.

• To delete a file from the list of favourite files, click on Remove from favourites under

5.2.5. How to create a new document 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 left navigation menu, click on Filing Plan menu, under File 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) Click the button next to the 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*:

![Add a new document](image)

(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. More details about the creation of a new document? See chapter 5.

(7) Click **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** button:

![Filing plan](image)

- You have the option of completely closing the filing plan by clicking on **icon at the far right of the screen:**

![Close the entire tree](image)
5.2.6. How to reply to a document or an internal message?

Context
A registered document or an internal message can be used to generate a reply. The system automatically fills some fields and links the two documents if you use the button.

Method
(1) Open the document concerned.

(2) You have 2 choices. Either you reply to a the document with the same format (i.e. you reply to a “document” with a “document” type and you reply with an “internal message” with an “internal message”) or you reply with the format you want:

- To keep the same format: click the button at the top right of the screen.

- To be able to choose the format, click the right arrow next to the button.

(3) Fill in the fields of the new document/ internal message. Some metadata will be inserted from the original document:

(a) Mail type: as during the creation of a new document, Ares will calculate automatically the reply typology, according to the type of the original document.

(b) The original title is entirely kept. The text [Re] is added at the beginning of the document title. If the title already contains other occurrences of Re: or RE:, the text [Re] will replace them all.

(c) Senders and recipients will be kept from the initial document:

- The original senders (internal and external) will be put as recipients in the field “To”

- The original recipients in copy in “Cc” (internal and external) will be put as well as recipients in copy in “Cc”
Specific cases:

- If the original document contains one or more external recipients in “To”:
  - The original external recipients in “To” will be put as senders
  - The original internal recipients in “To” will be put as recipients in “Cc”

- If the document does not contain any external recipient in “To”:
– The recipients in “To” belonging to the same DG as the creator of the response document will be put as senders

– The other “To” recipients will be put as recipients in “Cc”.

(d) The previous filing will be kept (but only if the creator of the reply is at least "file 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 **Save** or **Register and send**.

**Notes**

- The **Reply** button under the “Actions” menu is no longer displayed on a saved document.

- The following metadata will not be kept: the attachments, the comments, the person concerned and the dates.

- 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, s/he will be automatically deleted in the reply.

**5.2.7. What happens when a document is created with a virtual entity?**

(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 virtual entity, followed, between brackets, by the name of the user who logged in.

(2) In our example, then, you can see that the document was registered by *KAKURU RADHA Madhava* on behalf of the virtual entity *ve_digit.dmo*.

You can then see which user actually created the document for the virtual entity.
5.2.8. What happens if a document is created from a delegation?

(1) When a user creates a document on behalf of another person: the Creator field shows the name of the person who gave her/his delegation, followed, between brackets, by the name of the user who is logged in (i.e. the EU login user).

(2) In our example, then, you can see that the document was created and registered by [Redacted] on behalf of [Redacted].

![Image of a table with information]

It is then possible to see which user actually created the document on behalf of another person.

5.2.9. How to create a document "Note to the file"?

**Context**

A "note to the file" is used to document the decisions taken during a case/project. Therefore, this document must be filed in the corresponding case/project file. If the document commits the service (the decisions taken are not written in another document), then it should be registered. If the note only sums up the content of documents already registered, then it should not be registered.

**Method**

It is fully automatic. When you encode a document without any recipient in the “To” field, the system alerts you that this document will be treated as a “note to the file”. You can choose to continue or not:

![Image of a dialog box for creating a note to the file]

The “Note to the file” typology is visible in the document details (after clicking on the button):
5.3. Attachments

Depending on the document status and its current lifecycle step, a document may contain attachment(s) [see details chapter 5.1]. The attachment format evolves following this lifecycle (conversion in PDF, addition of a stamp...)

5.3.1. How to add an attachment to a document?

Context
You can attach a file through importation of scanning. After importing or scanning an attachment, click on its type to open it. You can add as many attachments as possible, but for technical reasons it is better not to go over 200.

⚠️ You cannot enter the following special characters in the Attachment name: ',' /: * ? “ <>!%. Ares automatically detects these as they are entered (the text becomes red) and it is impossible to continue:

<table>
<thead>
<tr>
<th>terre dpc</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type ext. referenc</td>
</tr>
</tbody>
</table>

The name of the attachments may not contain the following characters: '/:*<>!%

It is also not recommended to upload attachment whose title contains a dot "." Indeed they might be refused by an external anti-virus. If so, a warning is displayed:
Method

- Importing

1. Click on button to import the attachment.

2. Select the type of attachment: Cover note, Main document or Annex.

3. Browse to find the document you need and select it.

4. The Attachment name and its format are automatically detected and entered. An icon representing the format is displayed next to the attachment name. You can open directly the attachment clicking on this icon:

5. You can modify the attachment name typing directly in the related field:

6. After registration, all attachments will be converted in pdf and stamped with the Ares number and the registration date. You can however choose not to apply the on an annex. Untick the box when you do not want the stamp on an attachment and then confirm:

---

11 This can be useful for attachments that previously have been integrated in Decide frome-Greffe (and already have an official COM number) or for annexes relating to a long correspondence with external partners when signing contracts (where the last version of the contract is the most relevant).
(7) Enter the external reference if there is in the field *Type ext. reference*, e.g. the reference given in a mail received from outside the Commission.

(8) Select the *Language* of the text from the drop-down list. (The default value for the field is *no language*)

You can delete the attachment through the bin icon.

When there are at least five attachments in a document, a new hyperlink “Set language to all” is shown. On click, it opens a pop-up window to assign the same language to all the attachments. (the choice is not retained for possible future attachments; “No language” will be selected by default for those).

You can also use the *drag & drop* method to drop one or several more attachments in your document:
• **Scanning with Ares**

1. Click on the **Scan** button to add the divider that will allow you to use scan to Ares.

2. Select the type of attachment: *Cover note*, *Main document* or *Annex*

   ![Select Attachment Types]

3. The *Attachment name* is automatically displayed, it is entitled *Scan* by default.

   ![Attachment Name]

   To ensure a smooth scanning and registration process, it is advised to modify the name, especially if the document contains several attachments to scan. The name modification can be done directly typing directly in the related field:

   ![Modify Attachment Name]

4. Enter the external reference if there is in the field *Type ext. reference*.

5. Select the *Language* of the text from the drop-down list. (The default value for the field is *no language*)
You can delete the attachment through the bin icon.

(6) Enter a title in your document and save it.

(7) In the “General” tab of the document, click on the barcode corresponding to the attachment.

(8) To print the divider, enter first the divider information:
The Attachment name is entered automatically based upon the title entered at point (4).

Tick the “Two-sided scanned document” checkbox to scan the document on both sides. The same “Two-sided” option must also be selected on the copier/ multifunctional device. The divider’s verso side will not be scanned. (If the box has not been ticked for a two-sided document, the first scanned page will be empty).

Indicate the total number of sides, regardless the format of the document (resto, recto-verso)

Tick the following checkbox if you authorise the modification of the document.

Tick the last checkbox if you want to set an expiry date for using the divider.  

Click on button to start printing the divider.

(9) Continue the procedure on your copier/ multifunctional device:

Place the divider you have printed in the appropriate tray, followed by the document(s) to be scanned.

Select the button to scan to Ares (it may be called differently according to the device you use: Scan to Ares, Scan and Send/ To Ares sided, To Ares 2-sided ....) If the Ares document to register contains at least one recto and one recto-verso documents, the documents will have to be scanned separately if you want to avoid scanning blank pages.

The document is automatically scanned and sent to Ares as an attachment in .tif format. (All scanned attachments will be converted into .pdf after registration. When an e-Signatory is launched, the .tif is also converted in pdf in the saved document to allow the preview).

5.3.2. How are displayed the attachments in Ares?

When the document is registered, clicking on an attachment’s title opens its PDF rendition.

---

12 These two last options have not been activated in the current version of the application.
For each attachment, specific information and actions are displayed. They may vary according to the type of attachment, the type of document (save/register) and your rights on the document/attachment:

With the **download** button you can download several attachments at once: select the attachments you need, then confirm with the **Download** button.
Notes
- The attachments in Ares open with the default application defined in Windows. For instance, if pdf attachments open by default with Acrobat Reader on your computer, attachments in Ares will be opened in Acrobat, and no longer in the browser as it is with Edge. When opening Ares pdf attachments with Acrobat Reader, you directly see the stamp and the signatures.

💡 In order to check what default application is defined for your computer for pdf, right-click on one of your pdf files, then select “Open with”. You can then see the default app specified. Click “Choose another app” to change it if necessary. Do not forget to tick «Always use this app to open .pdf files » to save your choice.
If you are working on Edge Chromium: you should first open the pdf file in Ares, then right-click on the icon, next to its name, at the bottom of the screen. Then, choose “Always open with system viewer” option. You can then define Acrobat Reader as the app to use when opening pdf files (see image above). Do not forget to tick “Always use this app to open .pdf files” so that your choice is kept.

- **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.

- **You cannot upload an empty attachment.**
• Moreover, it will not be possible to scan after registration: neither the printing of the divider nor the scanning will be allowed.

• You may use several times the same type of attachment in the same document.

• 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). Then, move up or down the arrow displayed when you mouse over the area at the right of an attachment:

![Attachment ordering screenshot]

The automatic sorting is then disabled:

![Manual attachment sorting enabled]

⚠️ It is then not possible to return to the automatic sorting, unless you delete all attachments and re-import/scan them again.

• You can scan out of Ares and then attach 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 "Sensitive Non Classified" security level. However, documents with an "RESTREINT UE/UE RESTRICTED" confidentiality level must not have attachments.
When an attachment is added and contains track changes: if nobody else has done a clean up before, the system accepts all changes at the end of the e-Signatory and before registration.

5.3.3. How to see the attachments of a document at one glance: check their preview!

Context
Attachments in documents (including the supporting documents) containing a saved or launched e-Signatory can be previewed (as is the case for registered documents).

The preview shows the attachments rendered in PDF (if their format is supported by the conversion) but the text recognition is not available. A preview might not be directly available due to the rendition waiting time.

They are not stamped with the save number either. Each time an attachment is added or modified (via check-in/out, files modification or modification of supporting documents), a new conversion is automatically launched.

Method

(1) In the document details, click on the button 🌐:

Or on the menu Preview attachments at the right of the screen
or from next to an attachment:

You can also see the preview from the inbox of received documents/tasks:

(2) You can do a direct search in the PDF files (through "CTRL+F" feature) and a useful zoom:
Notes
- You can print directly from the attachments preview (only available in Mozilla Firefox, Internet Explorer 11 and Chrome).

- To print with Microsoft Edge: after clicking “Print” button, a separate window opens. Simply print from there via the Microsoft Edge print window.

- These PDF conversions will be deleted after registration and the preview is only accessible when the conversion is complete (a warning waiting message is displayed in the meantime).

- You can launch a check-out from the Preview attachments window:
Once you click it, the attachment opens in its original format (for example MS Word). When your modifications are saved, your browser redirects you to the document details screen to do the check-in (or cancel the check-out). See chapter 5.3.2 for more explanations.

5.3.4. How to add a translation to a document?

**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:

- for saved documents: the document creator and to the current e-signatory actor
- for registered documents: the document creator and users with a DMO or CAD profile

It is also possible to remove translations in a saved document (if the document is registered, only DMO/CAD profiles can perform that action).

💡 You have the possibility to send a notification when a translation is added to a registered document.

⚠️ If you delete a "parent" attachment, all the linked translations will be automatically deleted.

**Method**

1. Click icon in the panel of the attachment to which you would like to link the translation to:
(2) Select the translation:

Specify the metadata and import the translation:

- **Type:**
  - Attachment: U:\SUI\Teams\Ares\Formation\Ares_E-learn\...
  - Attachment name: common procedures and methods .docx
- **External reference:**
- **Language:** EN - English
- **Notify the recipient(s) of the new translation:**
  - Checkbox: checked

**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.

- Browse and import the attachment corresponding to the translation
- Fill the external reference if necessary
- Specify the language
- If you want to send a notification to a recipient, tick the box *Notify the recipient(s) of the new translation*
- Click **Add** button
If needed, choose (tick/untick) who you would like to send the notification to and confirm:

![Notify the recipients about the new translations](image)

To view the translation: click  icon next to the concerned attachment:

![Processus.pdf](image)

**Notes**

- The stamp on translations will be identical to the stamp on the original "parent" document (same registration date and registration number).

- It is not possible to do a check-in/check-out on translations.

- To remove a translation in a saved document: click on **Modify/Register** button.

- To remove a translation in a registered document: you should contact your DMO/CAD.

- It is not possible to add a translation on documents with a level of confidentiality "EU Restreint", "EUR restricted" or "Sensitive Non Classified" with a marking "Court procedural documents/Comp special handling/OLAF investigations/OLAF investigations - special handling/Security matter/Pharma investigations - special handling"

**5.3.5. How to add an acknowledgement of receipt?**

**Context**
This option is available after the registration of the document and allows you to insert the image of an acknowledgement of receipt of your document. You can for instance insert the scan proving that you have sent the document physically.

**Conditions:** you have to be the creator or the registration author of the document or have a DMO/CAD profile to import an acknowledgement. Only a user with DMO/CAD profile can remove it via the "Modify special" button. Only one acknowledgement of receipt allowed per registered document and it is not available for documents with a confidentiality level/a marking preventing the addition of attachments.

A tooltip specifies the exact time of its addition. The receipt is also visible in the preview of attachments and a stamp with the registration date and Ares number is added.

**Method**

1. At the right of the screen click on "Add Ack. of receipt":

2. Then, import the receipt you have previously scanned, out of Ares:

   ![Specify the metadata and import the acknowledgement of receipt](image)

   - **Warning:** You may not remove or replace an existing acknowledgement of receipt. If removal is necessary, please contact your DMO.

   Click **Add** button.

3. The receipt is added in the list of attachments:
Notes

- The receipt can only be an image type (extensions allowed: pdf, bmp, jpeg, jpeg2000, jpg, tif, tiff, png).

- It is not possible to add an acknowledgement of receipt on documents with a level of confidentiality "EU Restreint", "EURI restricted" or "Sensitive Non Classified" with a marking "Court procedural documents/ COMP Special Handling/ OLAF investigations/ OLAF investigations Special Handling/ Security matter/ Pharma investigations -special handling".

5.4. Modifying a document

5.4.1. Who can modify a document?

A saved document may be modified by its creator. If the document is transmitted via an e-Signatory workflow, the current task actor is also authorised to modify it. An assignment task does not authorise the modification.

A registered document cannot be modified, except by the DMO/CAD team of the DG of the person who registered the document, under special exceptional circumstances.\(^\text{13}\)

\(^{13}\) See Ares “Administration” guide for more info about “Modify special” option.
5.4.2. How to modify the metadata of a document?

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 / Register button (at the top right corner):

![Document metadata interface]

(4) Modify the desired fields
(5) Click on Save or Register and send. Or click on Cancel button to exit the document without saving the changes.

Notes
- The ☯ icon next to certain values allows you to delete the value in those fields.
- Saved and registered documents filed in a file that is closed are then automatically frozen. For the saved documents, the corresponding e-Signatory tasks are then closed. Frozen documents can no longer be modified, unfilled or deleted. Frozen documents are clearly recognizable:

   EU Learn: Début du cours Canon
   ☯ Reg. number: Ares(2018)2476 - Frozen

If the file is re-opened, modifications are still not possible. However, persons with a CAD/DMO profile can add and update comments on frozen registered documents (if the document has been
registered in the DG of the CAD/DMO DG) through “Add comments” option (and not “Modify special”). After the file reopening, the document can then be deleted or unfiled.

5.4.3. How to modify the attachment of a document?

**Context**

An attachment to a saved document may be modified (if you have the required rights) through button or by creating a new version of this attachment (by "check out-check in" or with the button to manage versions).

**Method**

- **"Modify/ Register" button**

(1) Click option at the right of the screen:

```
Mise en place des procédures douanières agricoles communes

<table>
<thead>
<tr>
<th>From:</th>
<th>DIGN.B.2.007</th>
</tr>
</thead>
<tbody>
<tr>
<td>To:</td>
<td>SG.DSC2.B.1</td>
</tr>
<tr>
<td>CC:</td>
<td>DIGN.B.2.007</td>
</tr>
</tbody>
</table>

3 Attachments

- Main
- Cover
- Main

 Modify / Register

```

(2) Click the icon next to the attachment to delete:

```
Ares > Modification of document digit.b.2.007(2018)32153

<table>
<thead>
<tr>
<th>Main</th>
<th>Cover</th>
<th>Main</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rel_note_3.0_EN_long</td>
<td>Rel_note_3.0_EN_long</td>
<td>User_areas_FR</td>
</tr>
<tr>
<td>Type ext. reference</td>
<td>Type ext. reference</td>
<td>Type ext. reference</td>
</tr>
<tr>
<td>no language</td>
<td>no language</td>
<td>no language</td>
</tr>
</tbody>
</table>

Delete

```

(3) A warning is displayed. Click button to confirm the deletion:

---

14 See “Administration” user guide, for DMO/CAD for more details.
(4) Click **Attach** or **Scan** to insert another attachment.

(5) Save or register the document.

💡 There is a tracking of deleted attachments, acknowledgements of receipts and translations. When such attachments are deleted through a modification (via the "Modify/ Register" or "Modify special" buttons), a corresponding new line is automatically added in the "History" menu.

**Through Check out-check in:**

1. Check-out/ Check-in only works for Office documents. Use Manager Versions button for other file types.

(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 check-out icon (in the attachment panel) in order to book the document and prevent other users from modifying it at the same time:

(4) The attachment opens in its native Microsoft Office online application (MS Word, Excel or PowerPoint). No local copy is saved; the document is now kept directly in the server.

(5) The first time, you need to select <Allow> to continue and open the related MS application. If you do not want this window to be displayed next time, tick <Do not show me the warning for this program again>.
If you are working on Office 365, you might see an intermediate screen asking you to choose the linked application for the attachment. (Click “Remember my choice for ms-word links” to use this link to the next Word check in-check outs).

6) Make the necessary changes on the attachment.

7) When you have completed your changes, save your document.

8) Close the application.

9) You are automatically back to Ares. To upload your new version into Ares, click the <Check-in> button. You may insert comments:
Check-in is completed and your changes saved: your version is uploaded. The lock is removed and the document and attachment may be used by other users again. This version is now the current version of the attachment. To see all versions, click the <Manage versions> button.

💡 The option <Edit version> button gives you the possibility to re-open the document in Office (option available until you do the "Check-in").

If you do not want to put your updated version in Ares, cancel the check out:

### Notes

- **Type of files available for check-out in Ares:** mdb, mde, xls, slw, xlsx, xltm, xlt, xlsx, ppt, pptm, potm, potx, ppt, pptx, pps, ppt, mpc, mpp, mpv, mps, mpt, mpw, pub, rmh, doc, dot, docx, docm, dotm, dotx, wri. For any other file type, use <Manage versions> button.

- If an attachment remains in check-out mode (not followed by a check-in or a cancellation), the attachment will be automatically unlocked after 6 days (no warning received). Your changes will be then lost and the attachment will be available for a new check-out if necessary.

- **Specific messages.** If you encounter these messages, please: