



AresBridge

User guide

v 0.6

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1. WHAT IS ARESBRIDGE?

AresBridge is a tool that allows internal EC users to create Ares documents from collaborative sites (for example MyIC Collaborative Sites, CIRCABC, FPFIS Wikis, Connected,...), and to save and register them to the official documents repository Ares, ensuring all e-Domec rules are respected¹.

One example use case for AresBridge would be a team that uses a MyIC Collaborative Site in order to temporarily store, review and modify meeting minutes of a weekly project meeting until they are approved. At that point, someone in the team needs to (save and) register the final meeting minutes in Ares. Previously, the team member would need to place the meeting minutes from the collaborative sites on his computer, launch Ares, and from there, create a new Ares document and manually attach the minutes, fill in the metadata, recipients, etc.

Now, with AresBridge, the team member can directly trigger (by clicking on a <Send to Ares> button), from the team's collaborative site, the Ares document creation window containing the meeting minutes as attachment and the corresponding metadata. An Ares workflow (filing, assigning tasks, saving, registering) can then continue from there as usual.

2. ACCESS TO ARESBRIDGE

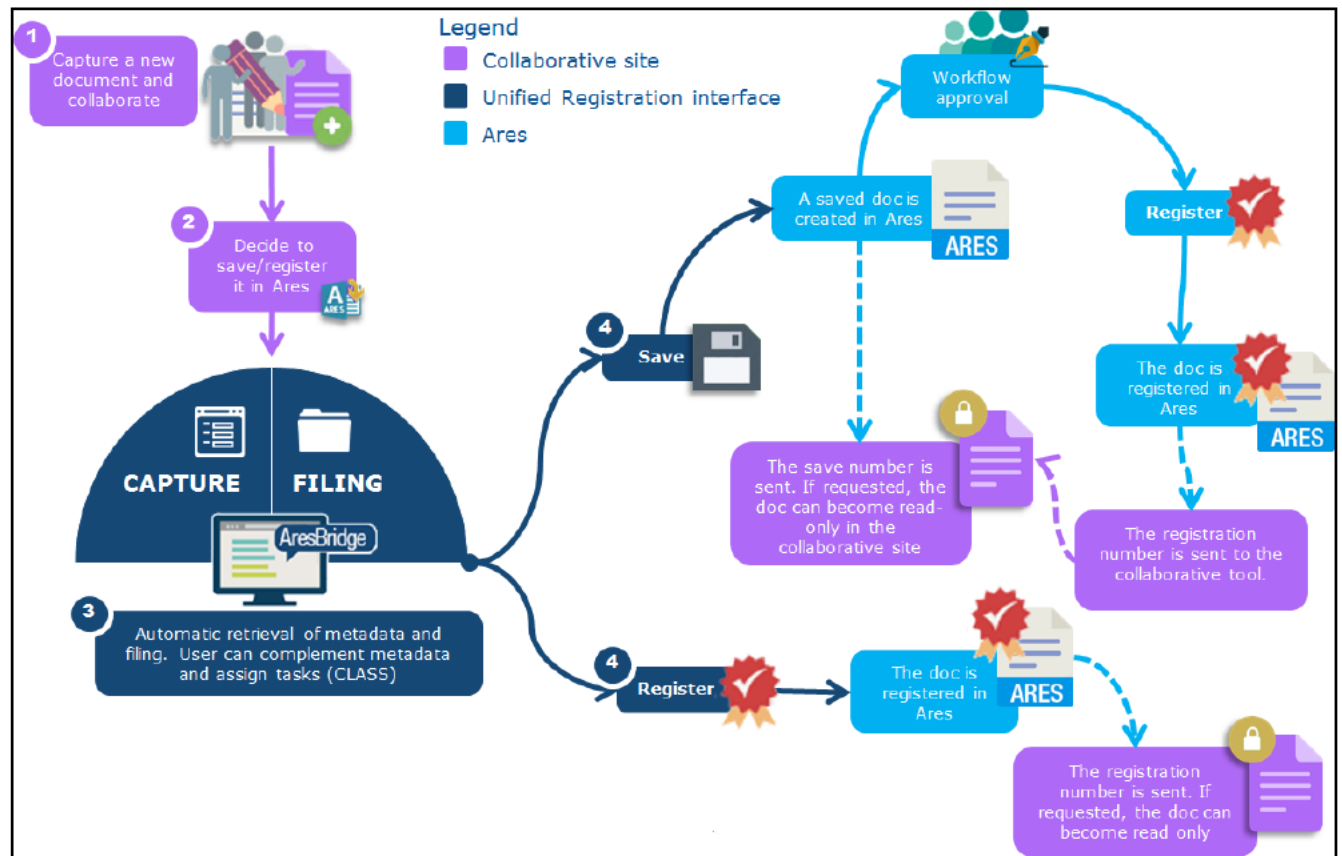
AresBridge offers many features by default. If needed, it can also be configured to accommodate certain needs. For example, in the case of the meeting minutes scenario, as the participants to the weekly project meeting are always the same, the team may decide that the collaborative site should automatically provide this information to AresBridge, so that the Ares recipients are always the same. The team can also decide that the recipients cannot be changed by the person who saves/registers the document.


There is thus a certain number of configuration options for AresBridge², which cannot be changed by users directly but can be changed by IT teams. Please contact your DMO and local IT team if you would like a specific configuration for AresBridge.

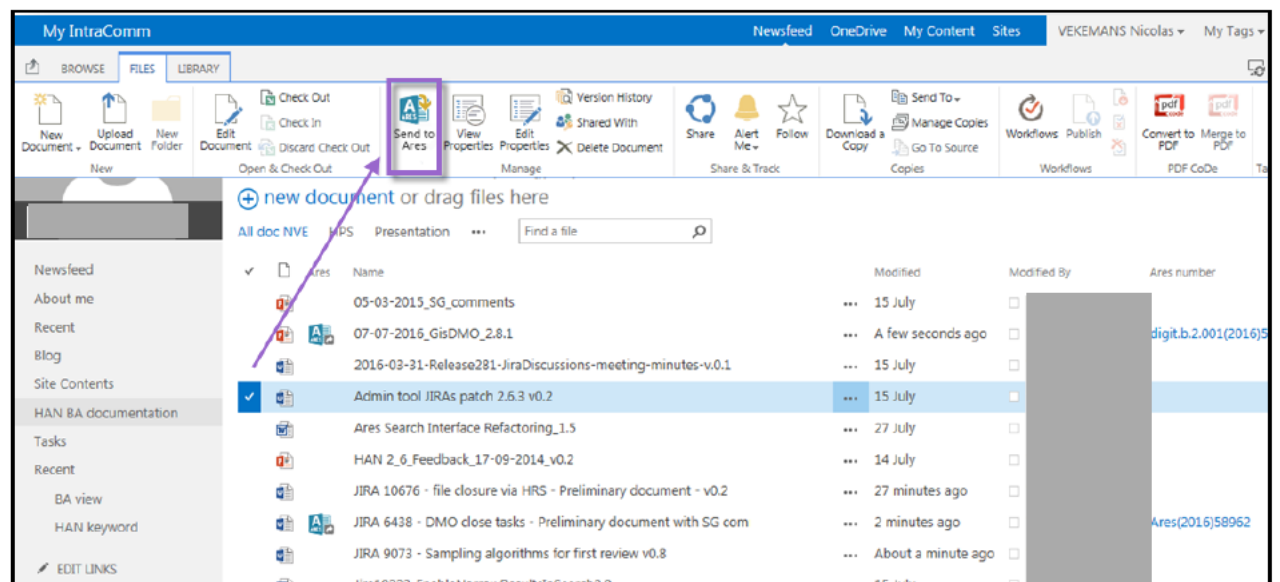
¹ Ares access rights are respected.


² See chapitre 6 of this documentation for more details.

3. SCHEMATIC VIEW




- (1) You and your colleagues are working on a document in a collaborative site.
- (2) Your document is finalised, and you want to save or register it in Ares: click on the button <Send to Ares>  (available from "Files" menu or if you right-click on the file):



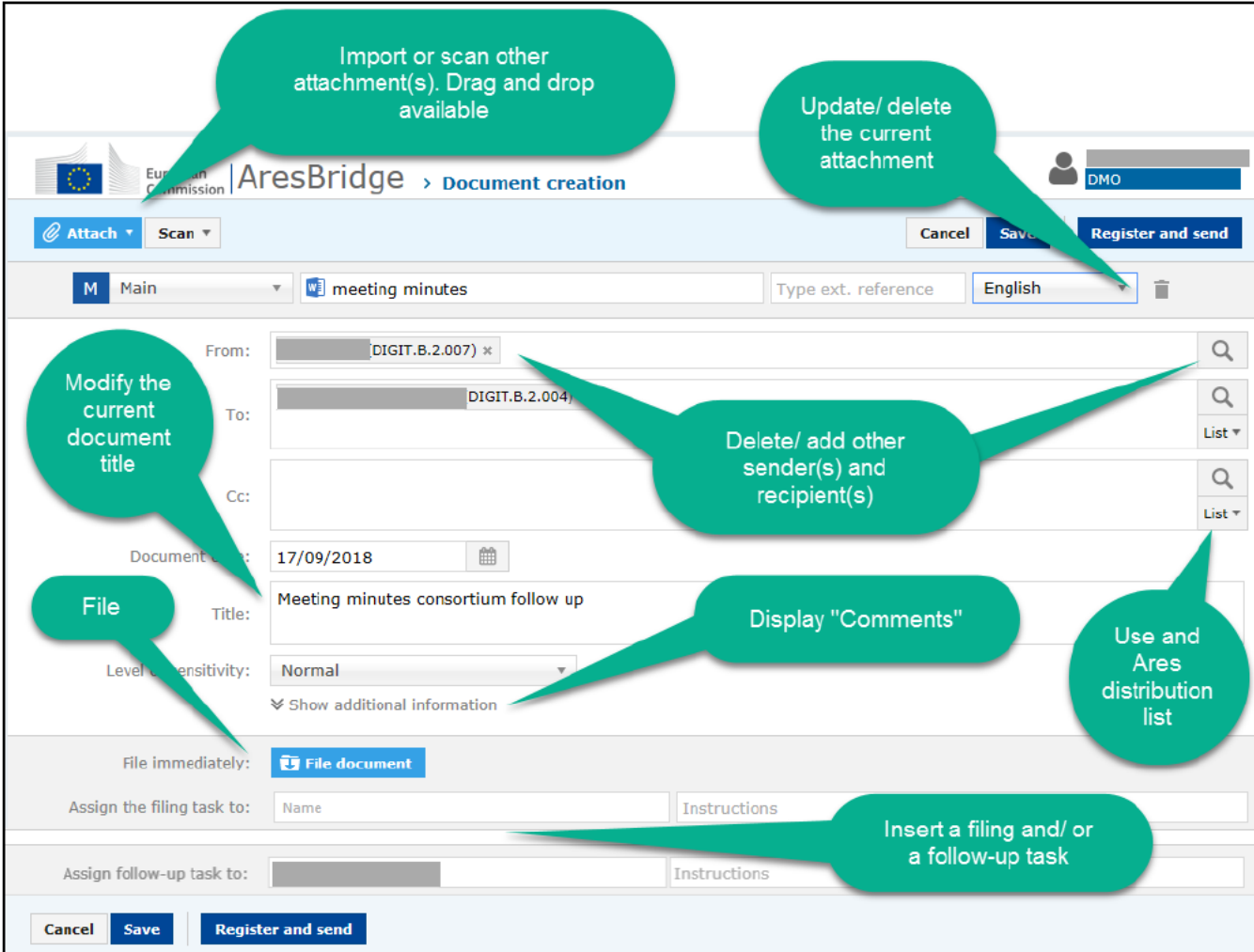
 You can select multiple documents in the collaborative site. They will be inserted as multiple attachments in the same Ares document.

- (3) The collaborative site sends the document's metadata to Ares. By default, the Ares document creation window offers the possibility to check and/or update additional data. Depending on the site, this may not be possible – for example if your team/DMO has decided that all saved documents should have a specific title pattern (like "Weekly HR project meeting agenda and minutes-12 Oct 2017")
- (4) You can save or register the document.

4. ARES DOCUMENT CREATION WINDOW

 The availability of the following actions depends on the configuration of the collaborative site. What is presented in the following sections are the possibilities available by default with AresBridge. If your collaborative site has a specific configuration, you may, or may not, be able to perform some of these actions. Please contact your DMO and local IT team for any questions.

By default, you can check and/or update the following fields:



The screenshot shows the AresBridge Document creation window. The interface includes a header with the European Commission logo and the text 'AresBridge > Document creation'. Below the header, there are buttons for 'Attach', 'Scan', 'Cancel', 'Save', and 'Register and send'. The main form area contains several fields and sections:

- From:** A text field with the value 'DIGIT.B.2.007' and a search icon.
- To:** A text field with the value 'DIGIT.B.2.004' and a search icon.
- Cc:** A text field with a search icon and a 'List' dropdown.
- Document date:** A date field with the value '17/09/2018' and a calendar icon.
- Title:** A text field with the value 'Meeting minutes consortium follow up'.
- Level of sensitivity:** A dropdown menu with the value 'Normal'.
- Show additional information:** A checkbox that is currently checked.
- File immediately:** A section with a 'File document' button.
- Assign the filing task to:** A section with a 'Name' field and an 'Instructions' field.
- Assign follow-up task to:** A section with a text field and an 'Instructions' field.

Callouts point to various elements:

- Import or scan other attachment(s). Drag and drop available:** Points to the 'Attach' and 'Scan' buttons.
- Update/delete the current attachment:** Points to the 'Cancel', 'Save', and 'Register and send' buttons.
- Modify the current document title:** Points to the 'Title' field.
- Delete/add other sender(s) and recipient(s):** Points to the 'From', 'To', and 'Cc' fields.
- Display "Comments":** Points to the 'Show additional information' checkbox.
- Use and Ares distribution list:** Points to the 'List' dropdown next to the 'Cc' field.
- Insert a filing and/or a follow-up task:** Points to the 'Assign the filing task to' and 'Assign follow-up task to' sections.

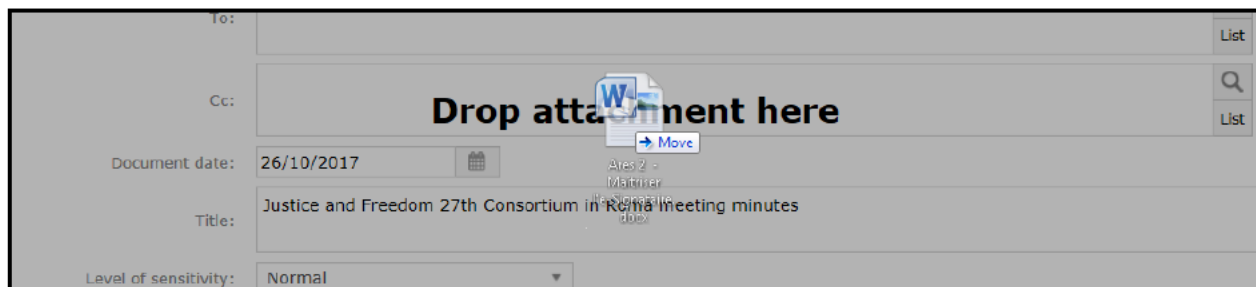
4.1. Attachments

Your documents are inserted as "Main" attachments. You can modify their metadata (change the type, status or language, insert an external reference). You may also delete them.

To import other files, click the  button. Click  to scan other files.



You can also use the **drag & drop method** to upload another attachment:



You can insert **several attachments** at the same time. They will be linked to the same Ares document.

4.2. Entities

For the fields *From* / *To* / *Cc*, an intuitive and efficient search method is at your disposal: **simply type what you know about the entity** you are looking for and then select it from the drop-down list.

Example: type *min fin* to search for the *Ministère des finances*:



If you do not remember the complete name, insert the part of the entity you do remember:



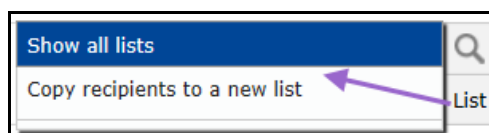
Or insert the EU login of the person:





Tips:

- You may type a full word or a part of a word in **any order**. No matter if it is a person, an organisation, an external or an internal entity.
- You may use letters from **any alphabet**: for example cyrillic characters or words with accents.
- The system will show **what corresponds most** to your search. The best scoring result will be displayed at the top of the drop-down list. Results are not shown in alphabetical order. The first part of your search (the part before the first space) has more importance in the scoring. The system will always put internal entities on top. For external entities, the highest validation level is shown first.
- To avoid having a huge quantity of results, **only 10 names** are displayed. If your entity is not in the list, you should refine your keywords.
- Another major advantage: updates in the database are **instantaneous**. As soon as an entity is modified (or deleted), this is automatically reflected in the drop-down list.
- You may use an **Ares distribution list** or create a new one from your recipient's list: click <List> button:



Select distribution list

1 - 1 of 1

Search:

Export

Filters:

Favourites

All

	Name	To / Cc	Type	Recipient #	Last modified
♥	Testing DL	<input checked="" type="checkbox"/>	DIGIT	5	05/10/2017 by palteki

- You still have access to a **full contact search** if you cannot find your entity, click on

Contact search

Search criteria

Validation : ☒ Not validated (level 1) ☒ Validated DG (level 2) ☒ Validated EC (level 3)

Name: First name: Email: ☐ Domain name only

City: Country: Select an Option ☐ Limit search to my DG

Creation: Any time (01/01/2008 - 27/10/2017) Last modif.: Any time (01/01/2008 - 27/10/2017)

Linked with an organisation: ☐ Yes ☐ No ☒ Doesn't matter


Person search results

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Action	Last name	First name	Organisation	Emails	Ctry	DG	Last modif.	Doc. #	Validation
<input type="button" value="Select"/>			BILL AND MELINDA GATES FOUNDATION		US	CA.1	20/10/2014	480	<input checked="" type="checkbox"/>
<input type="button" value="Details"/>			BILL & MELINDA GATES FOUNDATION		GB	CA.11	25/07/2014	0	<input checked="" type="checkbox"/>
<input type="button" value="Actions"/>						TAXUD	25/07/2014	0	<input checked="" type="checkbox"/>
			BILL & MELINDA GATES FOUNDATION		GB	CA.11	22/09/2014	3	<input checked="" type="checkbox"/>

List of selected contacts

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When you have found the entity, select it and it is automatically inserted in the document creation window.  Internal and external entities search and selection are harmonised.

4.3. Date

The *Ares Document date* is the date of today by default. You may modify this field manually or via the calendar:

Document date: 27/10/2017

Title:


Level of sensitivity:

4.4. Title


The *Ares Document title* is the title of your original document by default. You may modify this field manually or via copy & paste.


4.5. Filing

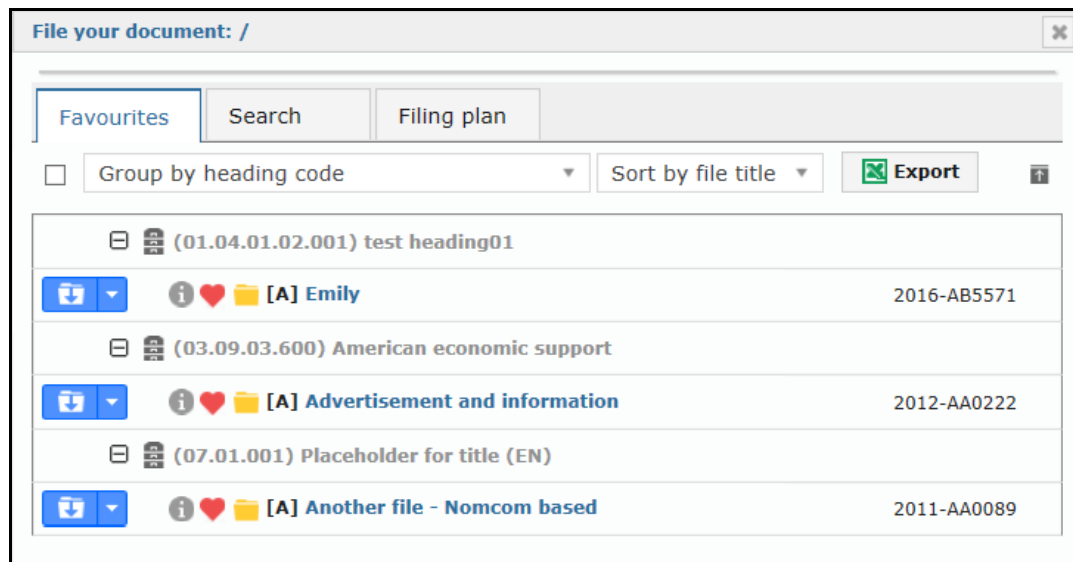
You may file your Ares document immediately from AresBridge or assign the filing task to a colleague. The system can retrieve file-related information depending on the configuration chosen by the collaborative site. In that case, nothing is displayed.


 In case you want to **register** the Ares document, it is **compulsory** to either file immediately or assign a filing task before being able to click on the <Register and send> button.

- To **assign a filing task**: insert the name of the colleague or virtual entity who will file the document in Ares.

- To **file immediately**, click on the button: .
The Ares filing window will be displayed.

Click on the  button to file your document in Ares :




( Your favourite files tab may be empty if you are an occasional Ares user).

4.6. Follow-up

It is possible to create an e-Signatory task for another person/ virtual entity to do the follow-up on the document, directly from the document creation/ modification screen. The code of this follow-up e-Signatory task is “AB-FWUP” (AB standing for AresBridge). It does not replace an e-Signatory; it is a quick way to grant a “write” permission on a document.

5. SAVE / REGISTER THE DOCUMENT IN ARES

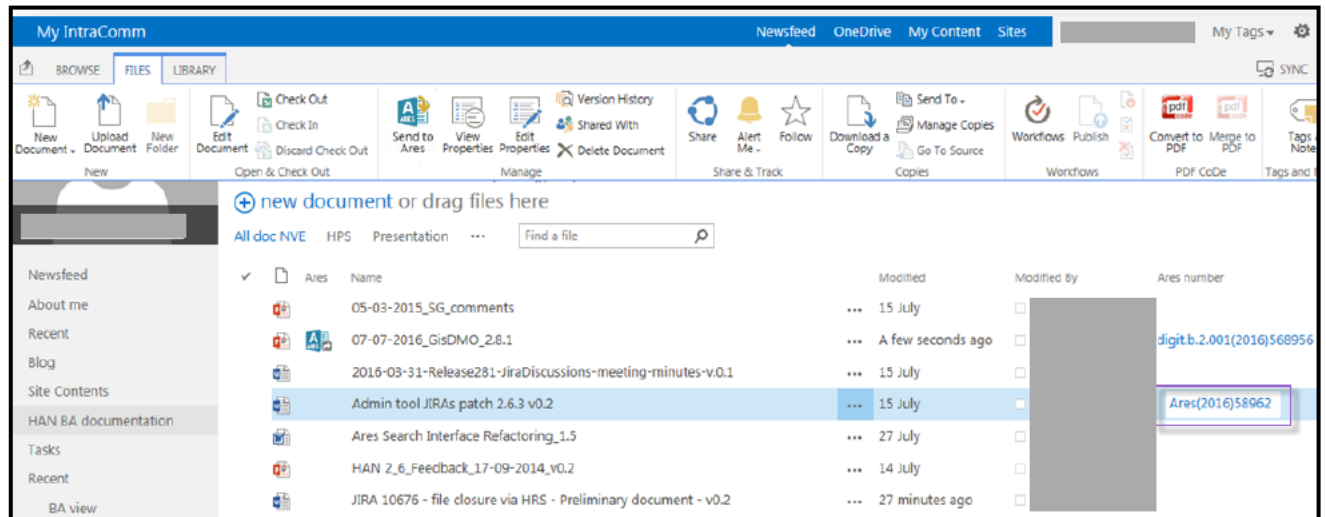
When you have checked all metadata, click on:

- : the document is saved in Ares and the **save number** is sent to the collaborative site. If requested, the document might not be modifiable any longer in the collaborative site (read-only status). An approval e-Signatory workflow can be launched in Ares in order to finalise the document. When the document is registered in Ares, the registration number will be sent to the collaborative site.

or

- **Register and send** → : the corresponding document is registered in Ares. The **registration number** is sent to the collaborative site and the document may be set on read-only in the collaborative site.

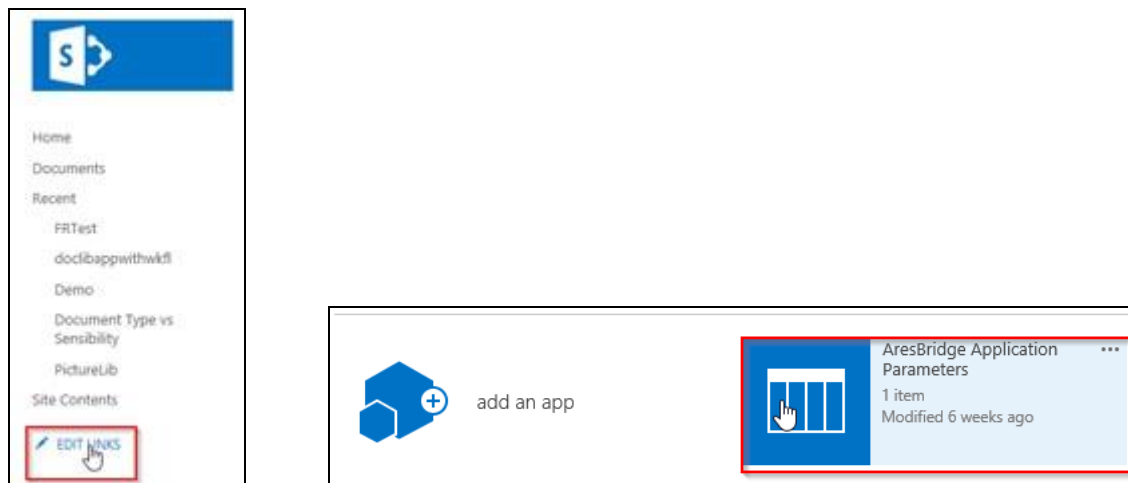
The document is then sent back to the collaborative tool.



💡 The collaborative site may choose to remove the original documents and replace them by direct links to the official Ares documents.

6. CUSTOMISATION OF ARESBRIDGE (FOR IT TEAMS)

There is a certain number of configuration options for AresBridge, which cannot be changed by users and DMO directly but can be changed by IT teams. Please contact your DMO and local IT team if you would like a specific configuration for AresBridge.



Please find below the list of parameters that can be customised in AresBridge :

- ✓ Possibility to edit the title (*titleEditable*)
- ✓ Possibility to edit the field “Comments” (*commentsEditable*)
- ✓ Possibility to edit the field “Document date” (*DocumentDateEditable*)
- ✓ Possibility to edit the field “Sent/ Received date” (*sentReceivedDateEditable*)
- ✓ Possibility to edit the sensitivity level (*levelOfSensitivityEditable*)
- ✓ Display of the “Save” button (*saveButtonVisible*)
- ✓ Display of the “Register and Send” button (*registerButtonVisible*)
- ✓ Display of the “Scan” button (*attachmentScanButtonVisible*)
- ✓ Display of the “Attach” button (*attachmentAttachButtonVisible*)
- ✓ Possibility to manage the attachments (i.e. delete an attachment, manage the versions, move up/down and disable the automatic sorting. This option cannot be hidden if “Scan”/”Attach” buttons are visible). (*attachmentManagementButtonsVisible*)
- ✓ Possibility to modify the attachments metadata (*attachmentMetadataEditable*)
- ✓ Possibility to edit the field “From” (*fromEntityEditable*)
- ✓ Possibility to edit the field “To” (*toEntityEditable*)
- ✓ Possibility to edit the field “Cc” (*ccEntityEditable*)

- ✓ Display of the button used for searching entities (*entitySearchButtonsEnabled*)
- ✓ Display of the button to manage/ use a distribution list (*distributionListButtonsVisible*)