



AresLook

User guide



Areslook 4.7.2

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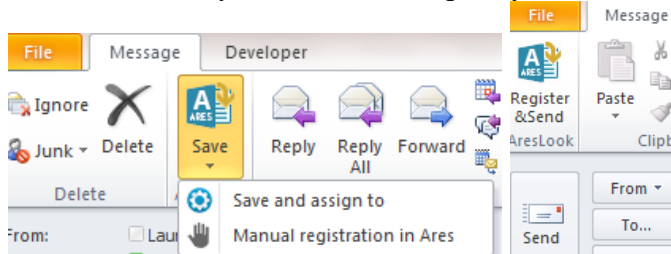
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1. WHAT IS ARESLOOK?

An add-in called **AresLook** allows you to register or save incoming and outgoing emails in Outlook. The information contained in the email will be stored as metadata in an Ares document.

Buttons are easily accessible and quickly visible, under Outlook “*Message*” tab.



Please note that documents sent by Areslook are also displayed under “*Recent*” documents list of the sender and the creator. Incoming documents saved by Areslook appear in the creator's list.

“*External transmission*” function (explained in Ares User guide) is closely linked with Areslook for outgoing emails.

Areslook may be used with other applications via HRS. Please note that you must use at least Areslook 3.7/ 3.8 in order to be able to continue to use HRS along with Areslook.

You must use at least AresLook 4.0 to be compatible with Windows 10/ MS Office 2016. AresLook 4.7 is compatible with Office 365 (desktop).

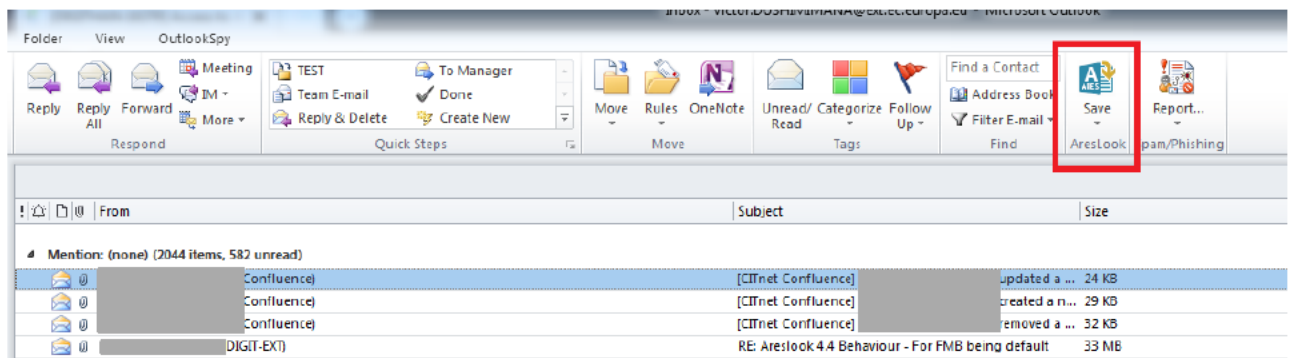
For security reasons, you must insert your EU Login password when you perform an action (« save and assign to », « Manual registration » ou « Register & Send ») for the first time, during the same session.

2. REGISTERING AN INCOMING EMAIL

To register an incoming email with Areslook: you may use a semi-automatic mode which sends a follow-up e-Signatory task to another person or to yourself ('Save and assign to' option) or a manual mode ('manual registration in Ares'). The FWUP (Follow-up) task generated by Areslook will be preceded by 'AL-' to indicate its origin. It is then called "AL-FWUP".



When an email is preselected in Outlook, you do not have necessarily to open this email in its own window to have access to the AresLook buttons. The AresLook ribbon is directly accessible from Outlook "Home" menu.

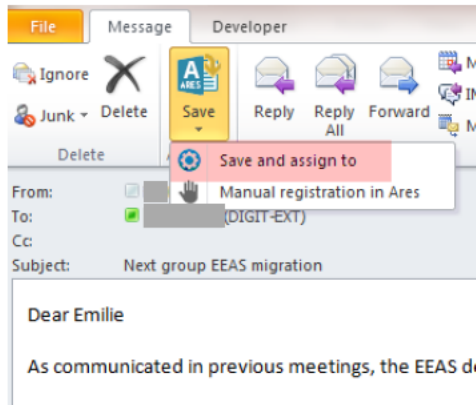


2.1. Save and assign to

This option automatically saves your document in Ares and sends an e-Signatory follow-up task (AL-FWUP) with comments to another user/virtual entity or to yourself. The assignee will perform a quality control on the saved document and will register it in Ares.



- (1) Open the email you would like to register
- (2) Under Outlook "Message", click Areslook <Save> button, next to <Reply> action in the details of the message window and choose the first option <Save and assign to>:



(3) Fill in the necessary data:

AresLook 4.7.2 - Incoming mail - Automatic save procedure

From: [REDACTED] (DIGIT) Date: 08-03-2022 10:13:35

To: ve_digit.digitares support (DIGIT);

Cc:

Subject*: [Extranet Wiki] MICM - Form ID= 1646730698629 / date: Tue Mar 08 2022 10:11:38 GMT+0100 (Central European Standard T

Sensitive personal data: ☒ Yes ☐ No

Registration

Assign registration to*: ve_hr.c4.local.training.5(HR) [Check names](#)

Instruction:

Please assign the filing task or do the filing immediately



Assign the filing task to: Type a person or virtual entity name and click enter or on "Check names" button [Check names](#)

Instruction:

Or file it in your favourite file

	File code	Specific code	File title	Chef de file	Status	Decimalisation
<input checked="" type="checkbox"/>	2009-A80317	MEDSTAT/2001/S/DN004360/CN111815	Contract 111815 Medstat II Lot 1 Horizontal Activities	nearb.2	CLOSED	05.02.050.050.170
<input type="checkbox"/>	2009-AC5466	OLAF Spain & Portugal	OLAF	agri.c.2	ACTIVE	09.01.06.081.011
<input type="checkbox"/>	2009-AC5468	F5 (ex-G1) Lettres Citoyens	Lettres des Citoyens	agri.c.2	CLOSED	03.11.05.001.001

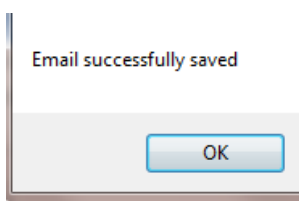
- *From*: Sender of the email (cannot be modified, automatically filled by the system).
- *To*, *Cc*: Recipient of the email (not modifiable)
- *Subject**: Title of the email (if the email did not contain any title, the field can be modified, and will not be greyed). It will be the **title** of your Ares document.
- *Sensitive personal data* : tick this box if your document contains sensitive personal data. It is optional and unticked by default (equivalent to the 'Unknown' option in Ares). Be careful: when choosing 'Yes', the direct filing (from AresLook screen) in a favourite file becomes impossible and it is mandatory to assign a CLASS task.
- *Date*: Date and time of the email (not modifiable)

- Registration: Assign registration to*: Assigns an e-Signatory task (AL-FWUP) to a person ('person') or a virtual entity ('Virtual Entity') for registration:  compulsory operation. Type the first letters (or the complete name) of the person/virtual entity and click on . Corresponding results are displayed in the drop-down list. The system displays at first the users from your DG, in alphabetical order. Double-click on the entity or select it from the arrows of your keyboard and press [enter]. If you will do the registration yourself, assign a registration task to your name (or your virtual entity).
Note: all Outlook contacts are available in the list. But, if you select a person who is working outside of the Commission or a functional mailbox, they will not be accepted by the system.
- You may type *Instructions*.
- Please assign the filing task or do the filing immediately: Assign the filing task to: a filing task (CLASS) must be assigned to a person or a virtual entity, with or without instructions. Insert a person or a virtual entity. If you leave it blank, the system will automatically assign a filing task to you. The system displays at first the users from your DG, in alphabetical order.
- You may file the document in one of your favourite files (You must first have imported your

favourite files in Ares via  button. More details under 1.3.1): tick the corresponding file:

	File code	Specific code	File title	Chef de file	Status	Decimalisation
	2009-AB7878	D006448	ECHO/INF/PUB/2007/01, APPEL D'OFFRES PUBLICATIONS 2007-2008, ENVOI I...	digit.b.2.001	ACTIVE	09.01.06.011.00...
	2009-AB8068	D007243	ECHO/INF/AUDVIS/2008/01, APPEL D'OFFRES POUR UNE CAMPAGNE D'INFO...	digit.b.2.001	ACTIVE	09.01.06.011.00...
	2009-AB8133	D007698	ECHO/INF/EVENT/2008/03, INFORMATION CAMPAIGN IN CYPUS, INVITATION ...	digit.b.2.001	ACTIVE	09.01.06.011.00...
	2015-AA2070	FileUpdate	File with many documents to evaluate performance	digit.b.2.001	ACTIVE	01.08.01.010

- (4) Click on <Save> to confirm. You receive a confirmation:



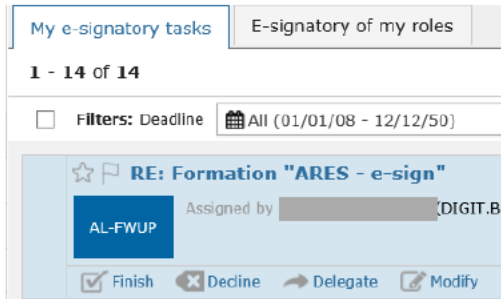
If you close Areslook window without saving, a confirmation is required:



Are you sure you want to exit without saving your email in Ares?



- (5) A corresponding saved document is created in Ares. A follow-up AL-FWUP task is sent to the user you have specified earlier under *Assign registration to* field:



- You are the **creator** of the document.
- **The sender** is inserted, if she/he is known from the system. If she/he is not or if the external entity is not unique, the field will be left empty. Indeed AresLook uses the **email address** (which should normally be unique) to recognize the entity (it is consequently important that the email addresses are correctly encoded).
! **AresLook does not create external entities with incoming emails.**
- **Recipient(s)**: such as the senders, if the recipients are recognised by Ares, they are correctly put as recipients in the Ares document. If there are many or if they are not unique, the field is left empty and a warning message is displayed: (Distribution lists are not kept).
- **Conversion:**
 - HTML email is converted to **RTF with Microsoft Word**. Embedded objects (such as images) are kept and the formatting is then better preserved
 - **The msg file is stored and attachments are kept in their native format** (with “Annex” type)
- (6) The user who has received the AL-FWUP task has then a write access to the document. She/he can proceed with the registration (quality check and correction on the document). If some fields were not correctly filled or missing, a warning is displayed and points out the errors.

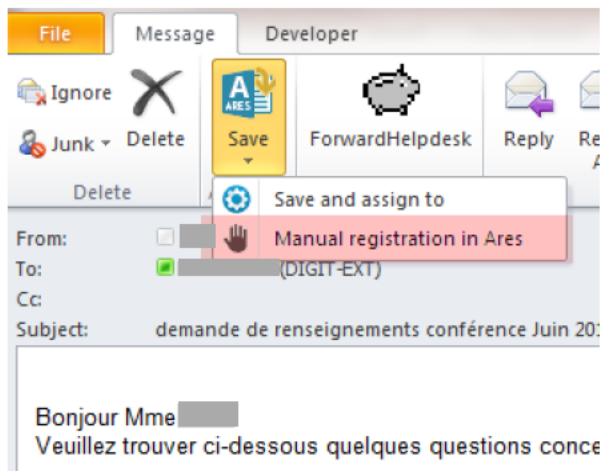
Notes

- Next time you use <Save and assign to> process, the last name/virtual entity you have used for the registration task will be automatically put by default. You can of course modify it if necessary.
- When someone has several affectations, her/ his sector is displayed when you roll over on the name.

2.2. Registering in manual mode

The email metadata are put automatically in an Ares document. You are re-directed to this document in Ares, to proceed with the save/registration in manual mode.

- (1) Open the email you would like to register.
- (2) Under “*Message*”, click <Save> button, then <Manual registration in Ares>:

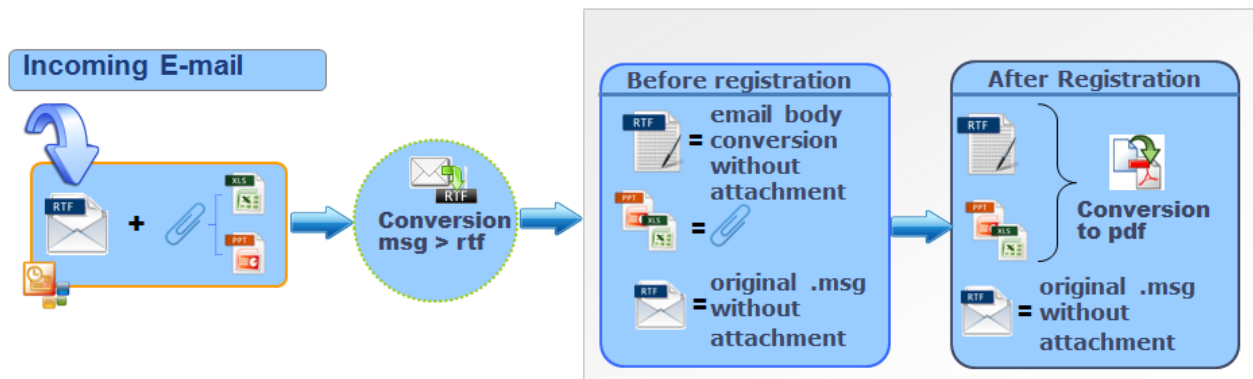


- (3) You are automatically redirected to Ares. If you were not yet connected to Ares, you must beforehand connect yourself with EU login.
- (4) The email metadata are copied and filled in the document (as done with the automatic <Save and assign to> procedure).

If some fields are empty or not correctly filled, the system highlights them at the top of the screen. You must correct the mistakes to be able to continue. If you have a “Base” profile, you can also assign a follow-up e-Signatory task (AL-FWUP) to a user/ a virtual entity to ask her/him to go on with the e-Signatory and/or register the document.


- (5) Please continue the process (save, assignment, filing, registration ...) as for any other Ares document.

2.3. Summary: Areslook incoming email: body and attachments



3. REGISTERING AND SENDING AN OUTGOING EMAIL

As a general rule for outgoing emails: documents created in Ares are sent out with Ares option “*External transmission*”. Nevertheless, for urgent emails, you may use Outlook and <Areslook Send> option: the **email will be then registered and sent by Ares**.

 When sending an email, there is a verification of the “FROM” field when using a Functional mailbox. Which implies:

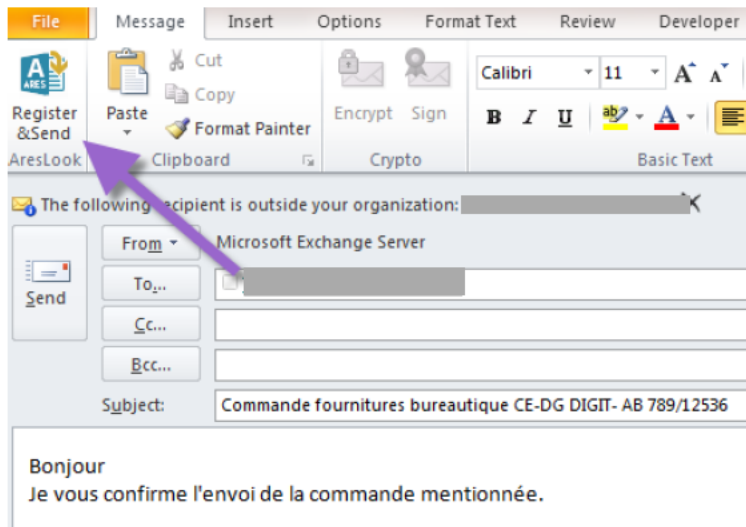
- Your virtual entity must be linked to the Functional Mailbox in ARES: please insert the alias and the email address in the properties of the virtual entities (see Ares user guide for details)
- You must be a member of this virtual entity.

Please note that, if you send an email on behalf of a colleague, you also need a profile delegation of that colleague in ARES.

When sending emails, the total size of attachments cannot exceed 30 MB.

3.1. Register and Send

- (1) When your email is ready to be sent out, click <Register&Send> under the “*Message*” tab:



- (2) You have several options:

AresLook 4.7.2 - Outgoing mail - Automatic registration and send procedure



From: [REDACTED] DIGIT) Date: 04-03-2019 11:35:17

To: [REDACTED]


Cc:

Subject*: Commande fournitures bureau CE-DG DIGIT - AB20019-02

Sensitive personal data: ☐ Yes ☐ No




 Send  Refresh Ares data

Please assign the filing task or do the filing immediately (if not, you will receive a filing task)


Assign the filing task to:  Check names

Instruction:

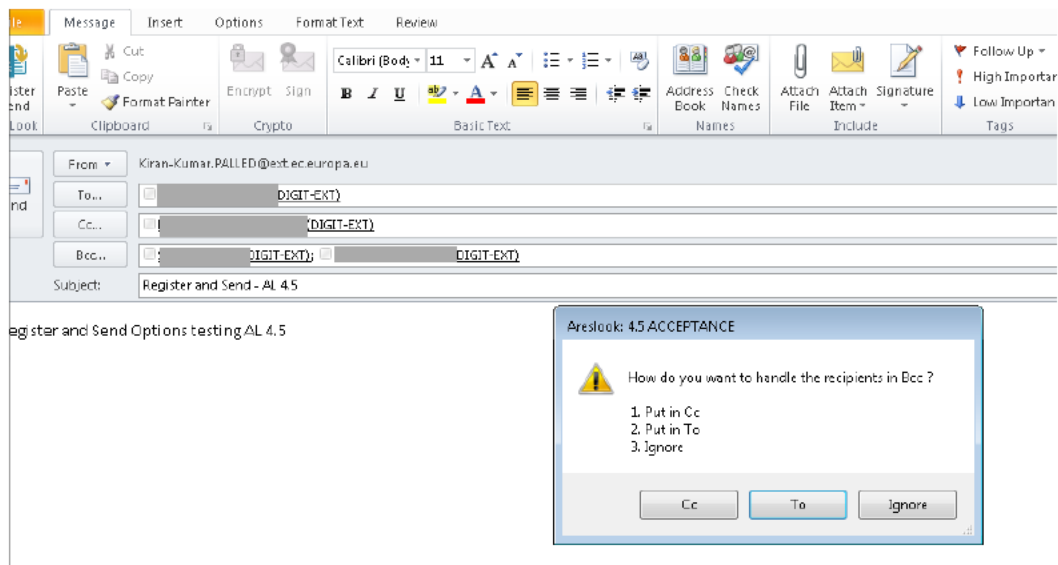
Or file it in your favourite files:

	File code	Specific code	File title	Chef de file	Status	Decimalisation
	2009-AB0317	MEDSTAT/2001/S/DN004360/CN111...	Contract 111815 Medstat II Lot 1 Horizo...	near b.2	CLOSED	05.02.060.050.170
	2009-AC5466	OLAF Spain & Portugal	OLAF	agri.c.2	ACTIVE	09.01.06.081.011
	2009-AC5468	F5 (ex-G1) Lettres Citoyens	Lettres des Citoyens	agri.c.2	CLOSED	03.11.05.001.001

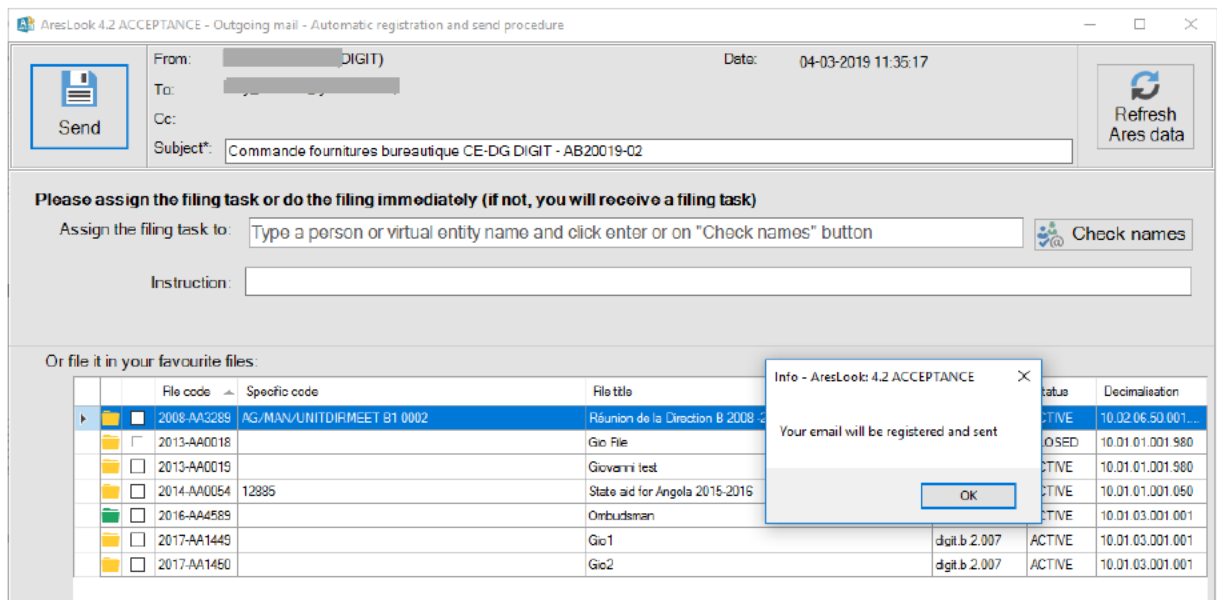
- You may modify the **title** of the document that will be created in Ares (so that it be compatible to e-Domec encoding rules).
- You may tick the box for Sensitive personal data if your document does contain such data. The box is not ticked by default (= “unknown” in Ares). Note: when choosing ‘Yes’, the direct filing (from AresLook screen) in a favourite file becomes impossible and it is mandatory to assign a CLASS task.
- **Please put a filing task** with instructions (optional) to a person or a virtual entity (If you have done the importation via <Refresh Ares Data> See details in 1.3.1).
- **File** the document in one of your favourite files. Tick the corresponding file:

	File code	Specific code	File title	Chef de file	Status	Decimalisation
	2009-AB7878	D006448	ECHO/INF/PUB/2007/01. APPEL D'OFFRES PUBLICATIONS 2007-2008, ENVOI I...	digit.b.2.001	ACTIVE	09.01.06.011.00...
	2009-AB8068	D007243	ECHO/INF/AUDVIS/2008/01. APPEL D'OFFRES POUR UNE CAMPAGNE D'INFO...	digit.b.2.001	ACTIVE	09.01.06.011.00...
	2009-AB8133	D007698	ECHO/INF/EVENT/2008/03. INFORMATION CAMPAIGN IN CYPUS, INVITATION ...	digit.b.2.001	ACTIVE	09.01.06.011.00...
	2015-AA2070	FileUpdate	File with many documents to evaluate performance	digit.b.2.001	ACTIVE	01.08.01.010

- (3) Click <Register and send>.
- (4) If you have inserted recipients in the BCC field of the email, you may choose to make them appear in the corresponding Ares document. A warning message is shown with 3 choices:
 1. Put the related recipients in the CC field, or,
 2. Put them in the TO field, or,
 3. Do not make them appear at all (as in the previous AresLook releases)



(5) You receive a confirmation:



(6) The email is sent and the document is automatically registered. You receive a confirmation email in your Outlook inbox:


From: [redacted] <giovanni.fiore@ext.ec.europa.eu>
 Sent: Monday, March 4, 2019 11:41 AM
 To: [redacted]
 Subject: Commande fournitures bureautique CE-DG DIGIT - Ares(2019)876

Bonjour


Je confirme l'envoi de la commande mentionnée.

Bien à vous

The email metadata are put in the Ares document: the **sender**, the **recipient(s)** and the **subject**. The **body of the email is converted in .rtf** and attached. (with “Cover note” type).

 If the external entity is recognised by the system, it will be set as recipient in the document. If it is not recognised, it will automatically be created.

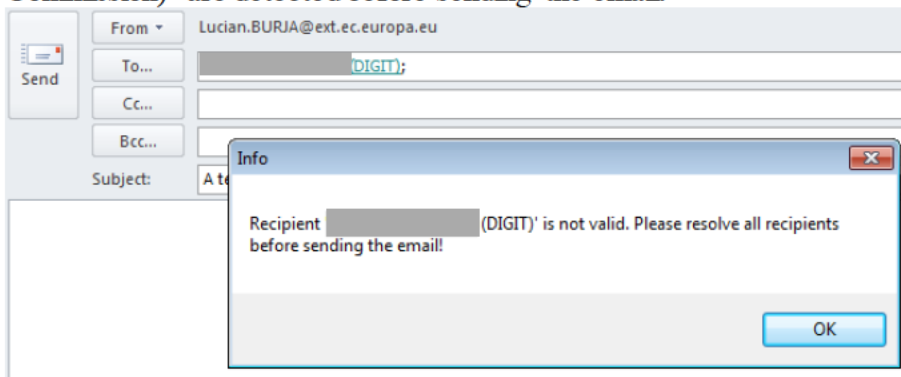
- **Conversion:**

- **HTML email is converted to RTF with Microsoft Word.** Embedded objects (such as images) are kept and the formatting is better preserved
-  **The .msg format is never attached in ARES document for the outgoing email.**
- **Attachments are converted in pdf and stamped** (if their format can be converted by EC PDF Code) but the sender receives the original email (as drafted in Outlook) and not the Ares PDF stamped files.

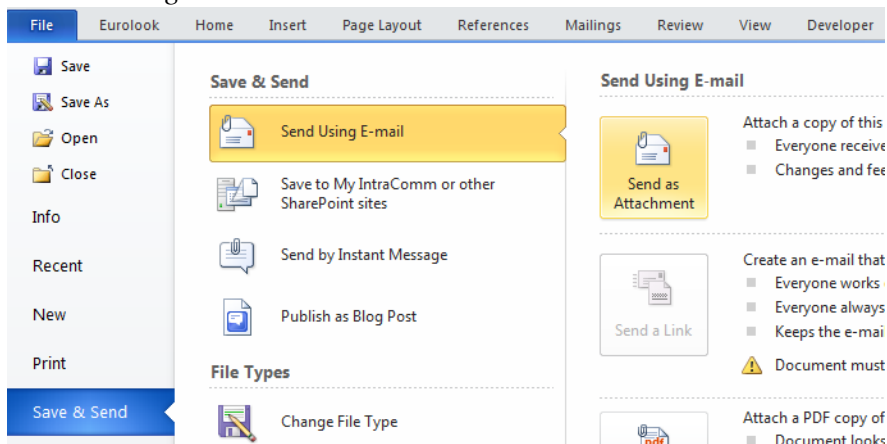
(7) The drafted email will be sent out through “*External transmission*” module. (You may do a follow-up of the sending in that tab).

Notes

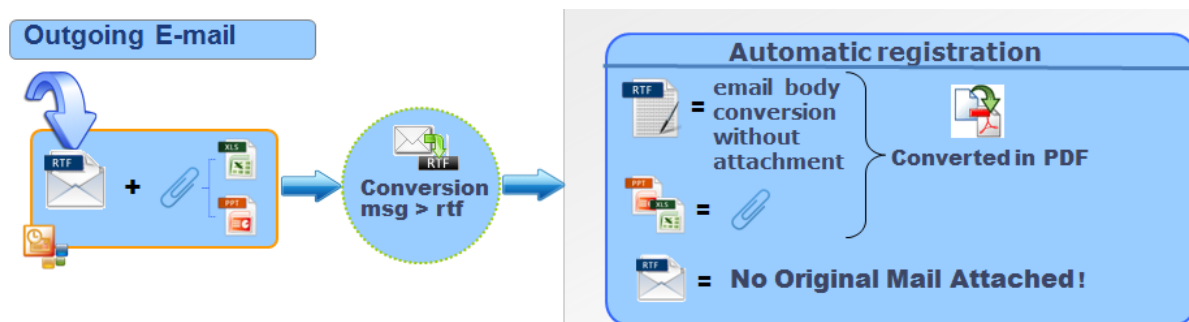
- Ares registration number is added in the subject of the email (at the end of the title of the email). The hyperlink to the Ares document is put at the bottom of the email with a warning specifying that it is only accessible to internal Ares users. It is not shown when all recipients are external partners or internal users with a “No Ares access” profile.
- If you belong to an institution that does not use the Commission SMTP server, the sender of the email is **EC ARES NOREPLY** (DIGIT-NOREPLYARES@ec.europa.eu). Please contact your DMO/ IRM team if you would like the sender’s name to appear for your institution.
- For Commission and executive agencies (for which the NoReply address is no longer used): the introductory pre-formatted text (“*Sent by XXX (DG Y) <email>. All responses have to be sent to this email address*”) is no longer added.
- Invalid internal email addresses (for example if a user has changed DG or left the Commission) are detected before sending the email:



- The automatic creation of virtual entities is blocked for incoming mails. Through 'manual registration' or 'save and assign to' procedure, the behaviour is identical to the behaviour for external entities. The system checks if there already is a corresponding entry in the virtual entity, based on the email address, i.e. the system checks whether the email address is identical. If no virtual entity is found using the email address(es), then the field will be blank (no automatic virtual entity creation when the document is saved). You are informed (or the person doing the quality control) that one or more virtual entities have been defined in the initial email and it is up to you to decide whether to create them.
- When creating an email, if the field '*from*' is filled with a name that is different from the name of the user currently using Areslook, the system checks if the user has received a delegation to work 'on behalf of'. Consequently, if you are not a member of a functional mailbox, you cannot register documents through Areslook on behalf of this mailbox
- Areslook requests the subgroups in a distribution list to be expanded before sending the email.
- Commission and executive agencies (for which the NoReply address is no longer used): the functional mailbox is shown rather than its technical name.
- To prevent any blocking, please avoid to use Areslook with Office option *File > Save & Send > Send using email > Send as attachment*.




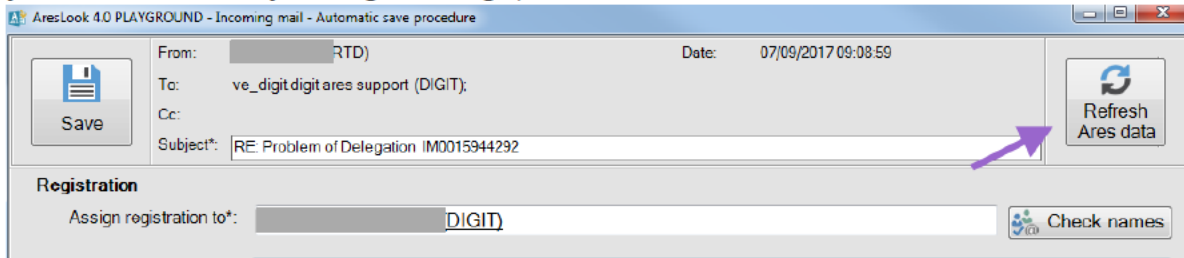
3.2. Summary: body and attachments of Areslook outgoing email



4. IMPORTING FAVOURITE FILES

You may import your Ares favourite files into Areslook: this enables you to file directly from the Areslook confirmation window.

- (1) In the confirmation window, click on  button (if you are not connected to Ares, you must first identify through EU login)




- (2) Your favourite files are automatically imported (one-off operation):

Or file it in your favourite files:

	File code	Specific code	File title	Chef de file	Statut	Decimalisation
<input checked="" type="checkbox"/>	2009-AB7978	D005448	ECHO/NF/PUB/2007/01, APPEL D'OFFRES PUBLICATIONS 2007-2008, ENVO...	digit.b.2.001	ACTIVE	09.01.06.011.00...
<input type="checkbox"/>	2009-AB8068	D007243	ECHO/NF/AUDVIS/2008/01, APPEL D'OFFRES POUR UNE CAMPAGNE D'INF...	digit.b.2.001	ACTIVE	09.01.06.011.00...
<input type="checkbox"/>	2009-AB8133	D007698	ECHO/NF/EVENT/2008/03, INFORMATION CAMPAIGN IN CYPUS, INVITATIO...	digit.b.2.001	ACTIVE	09.01.06.011.00...
<input type="checkbox"/>	2015-AA2070	FileUpdate	File with many documents to evaluate performance	digit.b.2.001	ACTIVE	01.08.01.010

Notes

- Closed files are displayed but cannot be selected.
-  It is not necessary to update and refresh virtual entities. It is done automatically.
- If you want to file a document in a specific file, please tick the corresponding file.
- Please re-do the operation when necessary (if your list of favourites has changed in Ares for example).
- AresLook always imports the favourite files of the personal profile of a user. Even though you are working in an Outlook Functional Mail Box (FMB) and you are connected in Ares as a member of the corresponding Virtual Entity (VE), clicking on "refresh Ares data", will not take the favourite files from the VE, always the users' favourite files.