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Organisational development

JRC Document Management Training Plan

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1 INTRODUCTION

1.1 Context

1.1.1.1 All JRC activities and decisions are based on or lead to the production of documents. These documents need to be managed according to basic common rules applicable throughout the Commission. These rules set up the European Commission's Document Management Policy, better known as e-domec (Electronic archiving and Document Management in the European Commission) and further transposed in Internal Control Standard 11.

1.1.1.2 e-Domec is relevant to everyone in the Commission, therefore including JRC, who receives, produces or manages documents.

1.1.1.3 It is therefore of paramount importance that JRC staff is properly kept aware, informed and trained, on a continuous basis, about the scope and duties deriving from the e-Domec policy and impacting their daily activities.

1.2 Purpose

1.2.1.1 The purpose of this document is to provide the basis of a Training Plan in the area of Document Management within JRC taking into account the above mentioned context.

1.2.1.2 The present Training Plan also implements the action ref. 220.11(1) of the Directorate B Action Plan "IA-12-05 Audit of Document Management", dated 22/04/2014 (Ares(2014)1275845).

1.3 Scope limitation

1.3.1.1 The Training Plan focusses on the Commission's corporate IT applications developed for the management of the lifecycle of documents and files implemented in accordance with e-domec, namely HAN (Hermes, ARES, NomCom).

1.3.1.2 This training plan does not address the training needs concerning other IT tools for the scope for which they have been developed, although these tools are closely interrelated with document management features and may be further integrated with the Hermes platform (e.g. Jipsy for contracts and orders management, PPMT for public procurement management, ABAC for financial management …).

1.4 Acronyms and terms

CAD	Centre d'Administration des Documents (Document Management Centre)
CDF	Chef de File (lead department)
COFO	Coordinateur de Formation (Training Coordinator)
DIGIT	Directorate General for Informatics (of the European Commission)
DMO	Document Management Officer
E-DOMEC	Electronic archiving and document management policy of the European Commission
EC	European Commission
HAN	Hermes, Ares, NomCom
JRC	Joint Research Centre (of the European Commission)
NOMCOM	IT Tool for implementing the filing plan of the European Commission, also referred to "Nomenclature Commune"
SG	Secretariat General (of the European Commission)
SYSLOG	Training catalogue portal (of the European Commission)

2 CURRENT SITUATION

2.1 Introduction

2.1.1.1 The present Training Plan is developed taking into account a series of weaknesses identified in the training offer over the past two years (2012, 2013).

2.2 SYSLOG Catalogue

2.2.1.1 The SYSLOG catalogue offers a wide and complete range of training courses in the area of document management.

2.2.1.2 The offer covers both the e-Domec policy (organised by SG) and the IT tools intended for the e-Domec implementation, namely HAN (organised by DIGIT).

2.2.1.3 These courses are generally available in Brussels and/or in Luxembourg.

2.2.1.4 Most of these courses are supported by training material (PowerPoint presentations, manuals) made available in the SYSLOG catalogue, on the e-Domec intranet or on the ARES wiki.

2.3 Document management training in JRC

2.3.1.1 The following table summarise the training courses organised in JRC for the years 2012 and 2013.

Course	Site	2012		2013	
		Number of Sessions	Participants	Number of Sessions	Participants
ARES - Document management - First steps	Ispra	2	19	3	29
ARES - Document Management in practice	Ispra	7	55	2	21
ARES - Managing Tasks, Documents Search and AresLook	e-learning		18		
ARES - Step by Step - All you Need to Know Replacement of '*ARES - Managing Tasks, Documents Search and AresLook*'	e-learning		4		12
Handling Documents - Sensitive to classified Restreint UE	Ispra	2	45	1	12
General document management training - Part 1 (ARES/Notis/Secem/RUE)	Karlsruhe			1	14
General document management training - Part 2 (Secem/EUCI Registry/Classification system)	Karlsruhe			1	11
Handling Documents - Sensitive to classified Restreint UE	Karlsruhe			1	8
TOTAL		9	141	9	99

2.3.1.2 In addition, individual coaching and/or awareness raising on document management are organised in all JRC sites by the local CADs.

SITES →	BRUSSELS	GEEL	ISPRA	KARLSRUHE	PETTEN	SEVILLE
Training for newcomers	Internal training, within unit	Not included in newcomers programme, but CAD included in HR recruitee check list form	Not included in newcomers programme	Included in newcomers training day (twice a year) + CAD included in HR recruitee check list form	Not included in newcomers programme	Not included in newcomers programme
ARES e-Learning	Not explicitly promoted	Not explicitly promoted	Not explicitly promoted	Not explicitly promoted	Not explicitly promoted	Not explicitly promoted
E-Domec and ARES basic features	DIGIT "ARES hands-on"	Organised on-demand by local CAD.	Mass training on a bi-yearly basis	Organised on-demand by local CAD.	Organised on-demand by local CAD.	Organised on-demand by local CAD.
ARES Advanced features	According to DIGIT catalogue	Organised on-demand by local CAD.	Mass training on a bi-yearly basis	Organised on-demand by local CAD	Organised on-demand by local CAD.	Organised on-demand by local CAD.
Other specific training	Additional on-demand coaching is provided by local CAD	Additional on-demand coaching is provided by local CAD	Additional on-demand coaching is provided by local CAD	Additional on-demand coaching is provided by local CAD	Additional on-demand coaching is provided by local CAD	Additional on-demand coaching is provided by local CAD
ARES Administration	According to DIGIT catalogue	None	None	None	None	None
NomCom Administration	According to DIGIT catalogue	None	None	None	None	None

2.4 **Findings**

2.4.1.1 There isn't any common approach as concerns the content and the methodology pursued in Document Management training courses in JRC.

2.4.1.2 Training offered in JRC generally focusses on the IT tools, namely ARES and occasionally NomCom, i.e. on "how" to manage documents, therefore missing important aspects as to "why", "what", "when" and "where" to apply the e-Domec policy.

2.4.1.3 Training offered through the official channel (COFO) does not always rely on the standard courses proposed by SG or DIGIT in the SYSLOG Catalogue, therefore showing a need for Taylor-made courses.

2.4.1.4 Most of information and training courses related to document management are conveyed through coaching session organised by local CADs who do not necessarily have trainer background or experience.

2.4.1.5 Training in the field of document management appears to be organised on a one shot basis without any continuous approach with regard to ongoing development of the EC document management policy and related IT software applications or tools.

2.4.1.6 For the past 2 years, the number of trained staff appears very low considering the size of the DG and the level of staff turnover.

2.4.1.7 Training of CADs or DMOs is not given appropriate consideration.

3 TRAINING POLICY

3.1 Target audience

3.1.1.1 The JRC Document Management Training Plan is designed in accordance with the staff needs, i.e. with regard to their level of involvement in the e-Domec implementation in JRC, namely:

- Staff responsible for the implementation the e-Domec policy in their daily duties, i.e. staff in general, referred to "**end-users**", distinguishing:
    - o "**Desk Officers**", and
    - o "**Chef de File**" (or Lead Department).
- Staff providing the methodological and technical support to the end-users, such as the CADs, DMOs, and occasionally IT Helpdesks, referred to "**DM Administrators**";
- Staff performing control or audit activities, referred to "**Auditors**".

3.2 Training offer

3.2.1.1 The JRC Document Management Training Plan shall be harmonised and standardised for all JRC sites.

3.2.1.2 It shall embed both e-Domec and the related IT tools in an integrated and complementary approach.

3.2.1.3 It shall ensure that staff concerned is kept up-to-date, on a continuous basis, of any development of Commission's and JRC's Document Management Policy and its related IT tools.

3.2.1.4 Availability and frequency of courses shall be adapted to the needs, at site level, to ensure that staff is operational as quickly as possible.
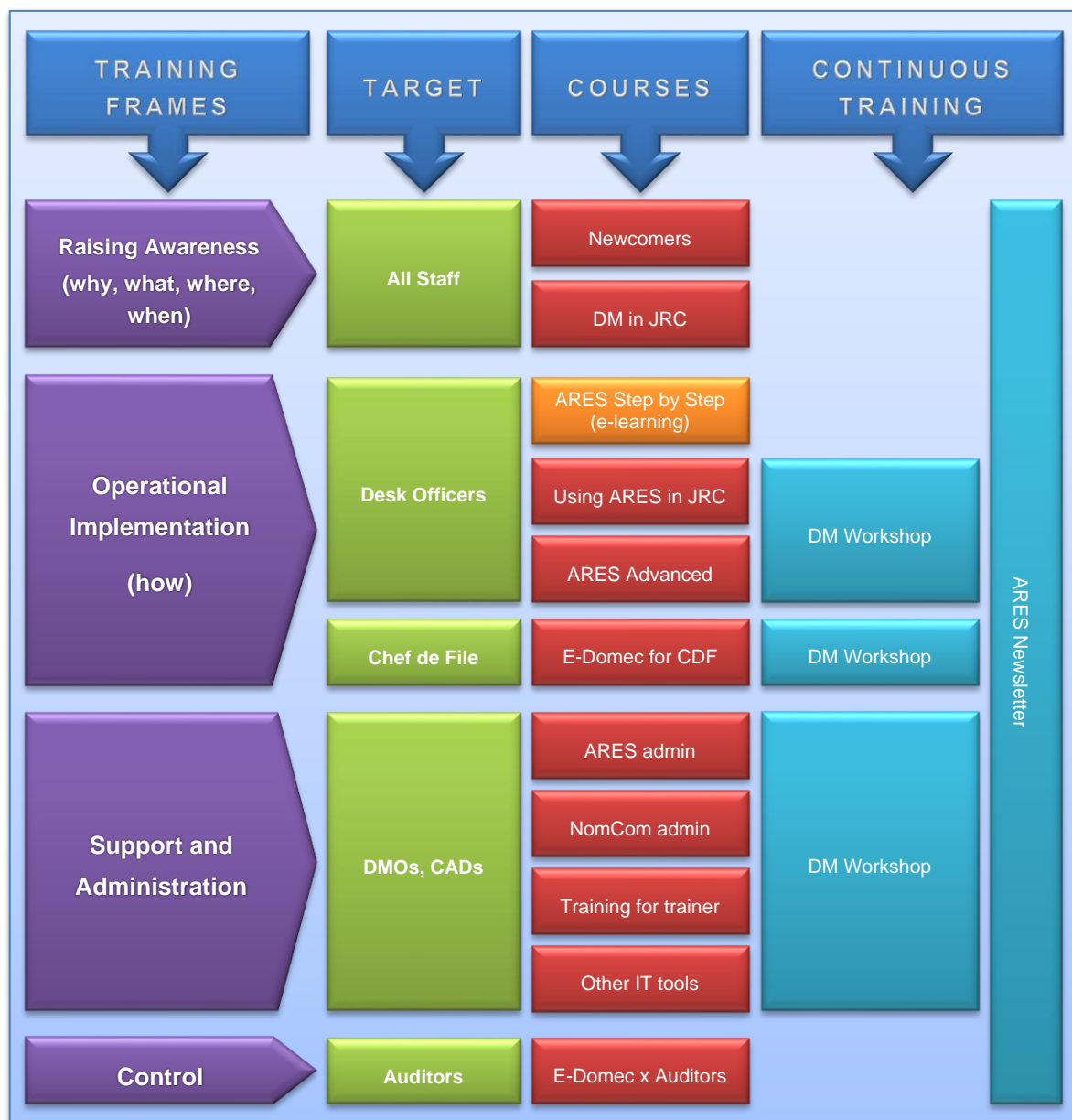
3.3 Personal objectives

3.3.1.1 Staff shall be encouraged to consider the "development or improvement of document management skills" as a yearly individual objective.

4 TRAINING FRAMES

4.1 Overview

4.2 **Raising awareness**

4.2.1.1 To ensure proper document management culture development, awareness shall be raised as soon as a new staff member takes duties within JRC.

4.2.1.2 Therefore, **all newcomers** shall be provided with brief information as to get to know about the document management policy applicable within JRC and to understand the steps to be taken to integrate it in their daily activities whenever relevant with the nature of their duties.

Raising awareness to Newcomers					
Target	Frequency	Trainer	Content	Dur	Methodology
All staff	Twice a month	DMOs, CADs	Standard Awareness Raising Message	n.a.	Email addressed to newcomer within 15 days after taking duties.

4.2.1.3 As a second level of awareness raising, the training plan shall provide with a general overview of "**Document Management in JRC**". In particular, this module shall detail the regulatory framework and the e-Domec policy (the "why"), the document life cycle ("what"), the filing plan ("where") and the common retention list ("when"), and the key actors ("who"). It will also provide additional information as concerns specific JRC applications intended for specific document management purposes. Eventually, this module may be embedded in the ARES hands-on course proposed in §4.3.2.

Raising awareness – Document Management in JRC					
Target	Frequency	Trainer	Content	Dur	Methodology
All staff	Once per trimester	DMOs, CADs	PPT presentation to be prepared by DMOs, based on existing SG material	1 hour	Presential, upon registration through Syslog

4.3 **Operational implementation**

4.3.1 Principles

4.3.1.1 The e-Domec operational implementation ("how") relies on two categories of **end-users** who shall be addressed adequate training courses in accordance with their respective responsibilities: the **Desk Officers** and the "**Chef de File**".

4.3.1.2 Operational implementation of e-Domec implies a sufficient and appropriate prior awareness about document management in JRC. Therefore, the frames referred to in §4.2 shall be the pre-requisites to any operational implementation.

4.3.2 Desk officers

4.3.2.1 "Desk Officers" refer to any staff members who ensure the creation, registration, filing and circulation of documents under the responsibility of the "Chef de File".

4.3.2.2 Desk Officers shall develop their skills as to "how" to perform their duties on a progressive and levelled approach, pursuing the following learning curve:

The first level consists in getting acquainted with the basic functionalities of ARES (document registration and filing, tasks assignments, e-signatories management and AresLook).

ARES – Step by step					
Target	Frequency	Trainer	Content	Dur	Methodology
Desk Officers	Available all year	DIGIT	ARES - Step by step – All you need to know	½ day	E-Learning, upon registration through Syslog
Desk Officers	Available all year	DIGIT	ARES - E-signatory Workflow and Managing E-mails with AresLook	½ day	E-Learning, upon registration through Syslog

As a second level training, Desk Officers shall be offered the possibility to reinforce their acquired skills, on a continuous basis, either by assisting a customised ARES hands-on course or on on-demand coaching basis.

Using ARES in JRC – ARES hands on for JRC Staff					
Target	Frequency	Trainer	Content	Dur	Methodology
Desk officers	In accordance with sites' needs and demand	DMOs, CADs	ARES Hands-on customised for JRC staff by DMO.	½ day	Presential, upon registration through Syslog, OR on-demand coaching register in Syslog.

The third level shall consist in getting to use advanced functions in ARES, in particular giving an insight into the JRC filing plan, and develop further knowledge of side aspects of document management such as NomCom, Notis, RUE, PPMT, RUE, EUIC, SECEM, etc…

ARES Advanced					
Target	Frequency	Trainer	Content	Dur	Methodology
Desk Officers	Once per semester, depending on site size and demand	DMOs, CADs, DIGIT	Combination of: ARES in practice for advanced users + ARES – Security management and markings + Additional JRC content to be prepared by DMOs	1 and ½ days	Presential, upon registration through Syslog

Finally, Desk Officers shall be invited to share and develop experiences, on a continuous basis, by taking part into workshops dealing with specific topics such as: JRC filing plan, the content of files, AresLook and External transmission, e-signatories, files closures and preservation…

ARES – Workshop for Desk Officers					
Target	Frequency	Trainer	Content	Dur	Methodology
Desk officers	Once a year	DMOs, CADs	Specific topic(s) in accordance with users' needs	tbd	Presential, upon registration through Syslog

4.3.3 Chef de file

4.3.3.1 The "Chef de File" refers to the organisational entity responsible for creating and managing the file concerning a case/dossier/project/…

In particular, the "Chef de File":
- Decides for the creation of an official file when a case/dossier/project/… is opened;
- Defines the content of its files;
- Ensure the filing of documents in its files;
- Is responsible for the completeness and accuracy of its files;
- Decides for the closing of its files upon conclusion of the corresponding case;
- Preserves the closed files;
- Works with the DMO in the initial appraisal of files and any transfer to the historical archives.

4.3.3.2 Understanding and coping with these responsibilities implies an appropriate training already available as per the SG's catalogue. The latter shall be made available in the JRC Document Management Training Plan.

E-Domec for Chef de File					
Target	Frequency	Trainer	Content	Dur	Methodology
Chef de File	Once a year	SG, DMOs	E-Domec CDF: Document Management responsibilities of Heads of unit and case managers	½ day	Presential, upon registration through Syslog

4.3.3.3 Additionally, "Chef de File" shall be invited to share and develop experiences, on a continuous basis, by taking part into workshops tackling with specific topics.

E-Domec – Workshop for Chef de File					
Target	Frequency	Trainer	Content	Dur	Methodology
Chef de File	On-demand	DMOs, CADs	On-demand	tbd	On-demand

4.4 Support and Administration

4.4.1 Principles

4.4.1.1 Document Management Centres (also referred to as "CAD") ensure that documents drawn up or received within their DG are managed in accordance with the e-Domec rules

4.4.1.2 Document Management Officers (DMOs) are appointed to ensure the setting up of a modern and efficient document and records management system within their DG in accordance with the e-Domec policy.

4.4.1.3 These roles are intended to provide end-users with the necessary and appropriate methodological and technical support for the implementation of the e-Domec policy.

4.4.1.4 Accordingly, the JRC Document Management Training Plan shall provide with a minimum required curriculum of training courses for this category of staff to ensure they are skilled to fulfil such duties.

4.4.1.5 This minimum curriculum shall embed:
- E-Domec skills
- ARES & NomCom administration skills
- Trainer skills
- Other IT tools skills

4.4.2 E-Domec skills

E-Domec for DMOs and CADs					
Target	Frequency	Trainer	Content	Dur	Methodology
DMOs, CADs	In accordance with SYSLOG catalogue	SG	The role of the DMO, of the CAD and of the contact persons for DMOs	2 days	Presential, upon registration through Syslog
DMOs, CADs	In accordance with SYSLOG catalogue	SG	Rules, responsibilities & tools @ the Com for the retention of docs & files	1 day	Presential, upon registration through Syslog
DMOs, CADs	In accordance with SYSLOG catalogue	SG	E-Domec Archives : Visit to the Historical Archives	½ day	Presential, upon registration through Syslog

4.4.3 ARES & NomCom skills

ARES & NomCom for DMOs and CADs					
Target	Frequency	Trainer	Content	Dur	Methodology
DMOs, CADs	In accordance with SYSLOG catalogue OR On-demand	DIGIT	ARES & NomCom administration Combination of : ARES - Training for DMOS/CADS + ARES- Hands-on for Administrator DMO-CAD + NomCom training (including HPS)	1 days	Presential, upon registration through Syslog
DMOs, CADs	In accordance with SYSLOG catalogue	DIGIT	ARES Workshop Testing	½ day	Presential, upon registration through Syslog

4.4.4 <u>Trainer skills</u>

Training skills for DMOs and CADs					
Target	Frequency	Trainer	Content	Dur	Methodology
DMOs, CADs	In accordance with SYSLOG catalogue	SG	E-Domec argumentation : Advocacy skills for DMOs	2 days	Presential, upon registration through Syslog
DMOs, CADs	In accordance with SYSLOG catalogue	HR	Training To Train For Occasional Trainers	2 days	Presential, upon registration through Syslog

4.4.5 <u>Other IT Tools</u>

4.4.5.1 Over the years, JRC has developed a series of software applications to cover its specific needs in a variety of administrative, financial, scientific or technical areas.

4.4.5.2 Some of these software applications are used *also* for document management purposes in their respective business scope.

4.4.5.3 A specific training module shall be developed with the relevant stakeholders to ensure that the DM Administrators are made properly aware of the scope and limits of these systems as far as document management is concerned. This module shall not be intended to train DMOs or CADs on the proper scope for which these systems have been developed, but limited to their relation with the duties of DMOs and CADs.

Other IT tools for DMOs and CADs					
Target	Frequency	Trainer	Content	Dur	Methodology
DMOs, CADs	Once a year	JRC	PPT presentation to be prepared by or with relevant stakeholders (PPMT, JIPSY, ABAC, PUBSY, …)	½ day	Presential, upon registration through Syslog

4.5 **Control**

4.5.1.1 Audit activities (internal audits, ex-post control …) imply notably the assessment of the efficiency and effectiveness of operations implemented in accordance with specific quality management and internal control systems.

4.5.1.2 In numerous cases, these assessed operations involve to the production of documents falling within the scope of e-Domec or similar document management regulatory frameworks.

4.5.1.3 Therefore, audit activities may also be intended to assess the efficiency and effectiveness of document management related to the audited operations.

4.5.1.4 In this context, the JRC's Document Management Training Plan shall provide with a specific training allowing staff in charge of such control mission to acquire the necessary skill to properly evaluate document management policies and to provide recommendations which are compliant with the applicable regulatory framework.

E-Domec for Auditors					
Target	Frequency	Trainer	Content	Dur	Methodology
Auditors	In accordance with SYSLOG catalogue	SG	E-Domec AUDIT: Training for auditors & inspectors during verification missions in delegations	½ day	Presential, upon registration through Syslog

5 TRAINING CONTENT

5.1.1.1 The DMO shall provide the COFOs with the necessary information and support for the implementation of the JRC Document Management Training Plan into the SYSLOG Catalogue.

5.1.1.2 The training content for each courses setting up the Training Plan detailed in §4 in provided in Annex A.

6 CALENDAR

6.1.1.1 Annex B provides with a tentative yearly calendar of the training courses to be organised in accordance with the above framework.

6.1.1.2 This calendar shall be refined in accordance with
- the needs at sites level
- resources availabilities (budget, trainers, training rooms, …)

7 COMMUNICATION PLAN

7.1.1.1 The JRC Document Management Training Plan shall be made available on the JRC Document Management intranet.

7.1.1.2 Training courses shall be announced by means of the usual channels (e.g. JRC Broadcast, SYSLOG Catalogue …) either to collect requests/expression of interest or any time they are effectively made available and scheduled.

7.1.1.3 Staff attending Document Management training courses shall be encouraged to register to the ARES Newsletter.

8 DOCUMENT MANAGEMENT

8.1 Control of this document

8.1.1.1 This document is a controlled document, and the document owner identified on the cover page has the duty to maintain it. This includes keeping the document up-to-date, making the latest version available to the users, and informing the users on the updates as necessary.

8.2 Records management

8.2.1.1 The records created for the implementation of the present training plan shall be managed in accordance with the records management defined in the procedure related to training management.

Records	Repository	Filing Plan (or equivalent in NomCom)	CRL Category
Registration to training course	SYSLOG	10.02.01.53.040.030.020	12.3.2 (Implementation of HR policies)
Attendance list	SYSLOG		
Training Evaluation sheet	SYSLOG		

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Annex A: Training content

1. AWARENESS RAISING (DMO)

1.1.   Raising awareness to Newcomers

Name	**Raising awareness to Newcomers**
Type	Auto training
Offered by	JRC DMO
Manager(s)	JRC DMO
Estimated Length	n.a.
Management Rules	Newcomers are addressed a standard email from DMO within 15 days after taking up duties.
Objectives	Raise awareness on document management
Target group	All newcomers
Content	Model Welcome Message to Newcomers prepared by DMO
Learning resources	Links to - e-domec toolkit - e-learning module - ARES newsletter subscription form Contact details of local JRC CAD and JRC DMOs
Planning	Twice a month.

1.2.   Document management in JRC

Name	**Document management in JRC**
Type	Auto training
Offered by	JRC DMO
Manager(s)	JRC DMO
Estimated Length	n.a.
Management Rules	n.a.
Objectives	Raise awareness on document management in JRC
Target group	Any staff
Content	Message from DMO
Learning resources	- e-domec toolkit - customised e-Domec presentation prepared by DMO
Planning	On demand

2. JRC DOCUMENT MANAGEMENT TRAINING CATALOGUE (COFOS)

2.1. ARES E-learning modules

2.1.1. ARES - Step by Step - All you Need to Know

Name	**ARES - Step by Step - All you Need to Know**
Type	E-learning
Offered by	DIGIT Training Services (DTS)
Manager(s)	DIGIT digit-training-services-elearning@ec.europa.eu
Estimated Length	3 hours
Management Rules	Applications through SYSLOG. Creating an application without selecting a course is allowed. Prior authorisation by line managers and COFO is not needed.
Objectives	This course enables participants to: - To be acquired a knowledge of the ARES application - To control the fundamental operations of document management at the Commission: Recording, Filing, Attributions, E-signatory, search.
Target group	This course is for anyone who must manage, classify the incoming and outgoing mail; to perform actions on tasks. Prerequisites: - general knowledge of IT tools - knowledge of the e-domec toolkit
Content	General introduction to ARES and ARESLOOK, Security, E-signatory, Delegation, Search, Exercises
Learning resources	ARES manual available on ARES' wiki
Planning	Available all year long

2.1.2 ARES - E-signatory Workflow and Managing E-mails with AresLook

Name	**ARES - E-signatory Workflow and Managing E-mails with AresLook**
Type	E-learning
Offered by	DIGIT Training Services (DTS)
Manager(s)	DIGIT digit-training-services-elearning@ec.europa.eu
Estimated Length	2 hours
Management Rules	Applications through SYSLOG. Creating an application without selecting a course is allowed. Prior authorisation by line managers and COFO is not needed.
Objectives	This course enables participants to: - Manage an e-signatory - Organize the sequential workflow - Use AresLook v.3.x correctly - Manage incoming and outgoing e-mails
Target group	This course is for anyone who knows already ARES, but has specific needs like the e-signatory workflow or the management of e-mails with AresLook v.3.x (add-in in Outlook). Prerequisites: - general knowledge of IT tools - knowledge of the e-domec toolkit - ARES - Step by Step - All you Need to Know (above e-learning module)
Content	ARES: the e-Signatory Workflow AresLook : Managing e-Mails
Learning resources	AresLook 3.1 Manual available on ARES' wiki
Planning	Available all year long

2.2.   "Using ARES in JRC" – ARES hands on for JRC Staff

Name	**Using ARES in JRC – ARES hands on for JRC Staff**
Type	Individual or grouped coaching
Offered by	JRC DMOs and/or Local JRC CADs
Manager(s)	JRC DMO
Estimated Length	½ day
Management Rules	Applications through SYSLOG. Creating an application without selecting a course is allowed. Prior authorisation by line managers and COFO is not needed.
Objectives	This course enables participants to apply e-domec and ARES skills in JRC.
Target group	This course is for anyone who must manage, classify the incoming and outgoing mail, and perform actions on tasks. Prerequisites: - general knowledge of IT tools - knowledge of the e-domec toolkit - e-learning module(s)
Content	Practical exercises to control the fundamental operations of document management in JRC, in particular: Recording, Filing, Attributions, Security, E-signatory, Delegation, Search.
Learning resources	Customised presentation and exercises prepared by JRC DMO
Planning	According to registrations.

2.3.   ARES Advanced

Name	**ARES in Practice for experienced ARES users**
Type	Classroom
Offered by	DIGIT Training Services (DTS)
Manager(s)	DIGIT digit-training-services-bxl@ec.europa.eu
Estimated Length	2 session(s) of 1 half-day
Management Rules	Applications through SYSLOG. Creating an application without selecting a course is allowed. Prior authorisation by line managers and COFO is required.
Objectives	Training on practical exercises Learning by doing in a due time.
Target group	This course is for anyone who wants to improve the practical knowledge about ARES. Prerequisites: - general knowledge of IT tools - knowledge of the e-domec toolkit - e-learning module(s)
Content	Practical exercises organized on this steps - Key points of each exercise - Difficulties - Tips - What I should I have learned?
Learning resources	ARES manual available on ARES' wiki
Planning	According to number of registrations. The course is opened as from 12 requests.

2.3. ARES Workshops

Name	**ARES – Workshop for Desk Officers**
Type	Classroom
Offered by	JRC DMO
Manager(s)	JRC DMO
Estimated Length	½ day
Management Rules	Applications through SYSLOG. Creating an application without selecting a course is allowed. Prior authorisation by line managers and COFO is not needed.
Objectives	Share and improve specific aspects of document management practices. Learning by doing in a due time.
Target group	This course is for anyone who wants to improve the practical knowledge about ARES. Prerequisites: - general knowledge of IT tools - knowledge of the e-domec toolkit - e-learning module - operational practice of document management tools
Content	Workshop proposed on a variety of aspects related to document management: e.g. JRC filing plan, the content of files, e-signatory, AresLook and External transmission, handling sensitive documents, markings, security, data protection, files closures and preservation, any other topic of interest proposed by participants.
Learning resources	n.a.
Planning	According to number of registrations. The course is opened as from 6 requests.

2.4. E-Domec for "Chef de File"

Name	**E-Domec for Chef de File**
Type	Classroom
Offered by	SG
Manager(s)	SG
Estimated Length	½ day
Management Rules	Applications through SYSLOG. Creating an application without selecting a course is allowed.
Objectives	This course is intended to: - Give to the heads of unit and case managers the ability to manage the operations under their responsibility during the whole life cycle of a document/file; - Explain how a rational document management can improve the performance of the units/services, and thus reduce the risks, e.g., of not finding documents on time or files requested by OLAF, the European Parliament, the Court of Auditors, the Court of Justice, the citizens, etc.
Target group	Directors, heads of unit and case managers in DGs.
Content	- Legal basis and objectives; - File life cycle and administrative cycle; - Knowing how to assess whether a document should be registered; document management tools; role of the file manager; - Official file and file for information; role of the lead unit and of the file manager; - File closure; - Methods and obligations of preservation; the responsibilities in DGs/Services; - Transfer to the Historical Archives or elimination of the files? the obligations to be known;

	- The electronic and digitised documents; the passage towards ARES and the e-Commission; - Examples and discussion.
Learning resources	https://myintracomm.ec.europa.eu/corp/sg/en/edomec/training/Documents/cdf_manuel_20110615_en.pdf https://myintracomm.ec.europa.eu/corp/sg/en/edomec/training/Documents/cdf_present_20111118_en.ppt
Planning	According to number of registrations.

2.5. e-Domec Workshops for Chef de File

Name	**e-Domec Workshops for Chef de File**
Type	Classroom
Offered by	JRC DMO
Manager(s)	JRC DMO
Estimated Length	1 hour
Management Rules	Applications through SYSLOG. Creating an application without selecting a course is allowed.
Objectives	Address e-Domec and Chef de File's roles and responsibilities in a nutshell.
Target group	Directors, heads of unit and case managers in DGs.
Content	e-Domec regulatory framework, files and documents lifecycle, Chef de File's roles and responsibilities, current DM challenges in JRC.
Learning resources	Customised presentation prepared by JRC DMO
Planning	Available all year long on demand or upon initiative from JRC DMO

3. EC DOCUMENT MANAGEMENT TRAINING CATALOGUE

3.1. Training for DMOs and CADs

Training courses intended for DMOs and/or CADs will not be publicised in the JRC's SYSLOG Catalogue.

DMOs and CADs will rely on the training courses available at the Commission level, delivered either by SG or DIGIT, either in Brussels or in Luxembourg.

Where the case arises, tailored-made courses may be organised by the JRC DMOs in close collaboration and coordination with the COFOs.

3.2. Training for Auditors

Training courses intended for Auditors will not be publicised in the JRC's SYSLOG Catalogue.

Auditors will rely on the training courses available at the Commission level, delivered either by SG or DIGIT, either in Brussels or in Luxembourg.

Annex B: Training Calendar

	All year long
	On-demand
	In accordance with SYSLOG catalogue
	Upon DMO's initiative
❶	JRC BRUSSELS
❷	JRC GEEL
❸	JRC ISPRA
❹	JRC KARLSRUHE
❺	JRC PETTEN
❻	JRC SEVILLA

	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Raising Awareness												
Raising awareness to Newcomers												
Raising awareness – Document Management in JRC	❸	❸	❶❷❸	❹❺❸	❻❸	❸			❶❷❸	❸❹❺	❸❻	❸
Operational Implementation												
ARES – Step by step (E-Learning)												
ARES - E-signatory Workflow and AresLook												
Using ARES in JRC – ARES hands on for JRC Staff	❸	❸	❶❷❸	❹❺❸	❻❸	❸			❶❷❸	❸❹❺	❸❻	❸
ARES for advanced users			❶❷❸	❹❺	❻				❶❷❸	❹❺	❻	❸
ARES – Workshop for Desk Officers									❶❷❸	❹❺	❻	
E-Domec for Chef de File												
E-Domec – Workshop for Chef de File			❶❷❸	❹❺	❻							
Support and Administration												
E-Domec for DMOs and CADs												
ARES & NomCom for DMOs and CADs												
Training skills for DMOs and CADs												
Other IT tools for DMOs and CADs												
Control												
E-Domec for Auditors												