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EBA Regular Use

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# EDEN – Electronic Document Management System User Guide

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## Abbreviations

EBA	European Banking Authority
EDEN	Electronic Document Management System

## Revision history

Version history	Date	Author	Comments
0.1	27 July 2016		First draft
0.2	19 August 2016		Later draft with comments from PM
0.2	26 August 2016		Sent for 1 <sup>st</sup> Level Review
0.3	05 September 2016		Comment Log -EDEN User Guide v02 1st le Sent for 2 <sup>nd</sup> level Review
0.4	09 September 2016		Comment Log -EDEN User Guide v0.3 2nd l
1.0	09 September 2016		For PSG Approval
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# 1. Introduction

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Since the founding of EBA in January 2011 the Organization has significantly expanded and developed hence the number of indispensable documents and regulatory products produced and managed by its operational departments/units has increased. Consequently, the need for a comprehensive solution for the electronic storing, organising, managing, and retrieving of produced documents has been identified as a high priority.

The implementation of Electronic Document Management System (EDEN), which is governed in accordance with IT security standards and aligned with the Commission's policies on Security of Information Systems<sup>1</sup>, and the Commission's security decision, has been finalized.

This document describes the process of uploading, storing, maintaining and retrieving EBA documents in the electronic document management system. The Portal is a robust and reliable document management platform that supports all aforementioned functionalities while providing versioning and access control to documents.

## 1.1 Audience

This document is intended for all EBA staff and as the portal serves as a mandatory and exclusive document management system for the Organization.

# 2. Scope definition

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## 2.1 EDEN main functionalities

The EDEN system aims at present a comprehensive solution for the electronic capturing, storing and classifying EBA's regulatory products and operational documents.

EDEN system allows for four main functionalities aligned with permission rights and user profiles using the system:

### 2.1.1 High level functions

The functional requirements of the EDEN are divided into the 4 key areas of a document system life cycle, as follows:

1. Create:

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<sup>1</sup> COMMISSION DECISION (EU, Euratom) 2015/444

To “create” documents, the EDEN interfaces with existing document-authoring applications such as MS Word, Adobe PDF, and PowerPoint. The creation of a document is much more than going into MS Office Applications and creating a new, empty document followed by assigning appropriate classification levels and metadata to the document through EDEN.

2. Maintain:

To “manage” documents, the EDEN will provide a repository for document storage with metadata, version control, permissions on a document by document basis, check-in/check-out. An audit log is available to system administrators, showing actions on all documents.

3. Search / retrieve:

To “search” documents, the EDEN will allow the end user to retrieve the document via querying the system. The ability to search for documents across the EDEN is based on metadata.

4. Deletion:

This function allows permanent removal of documents from the EDEN.

## 2.2 Technical prerequisites for using the EDEN system

The following items are required to access the EDEN system

1. Internet web browser:
  - Windows Internet Explorer v.8.0 or higher,
  - Google Chrome v.2 or higher, and
  - Mozilla Firefox v.4 or higher.
2. URL for the EDEN Portal : <https://EDEN.eba.europa.eu/>
3. Username (your username to Windows)
4. Password (your password to Windows)

## 2.3 Users and roles

### 2.3.1 User

Any person with permission to access the system is a user. That is, anyone who creates receives reviews and / or uses documents stored in the system. This is the standard level of access.

### 2.3.2 Roles and permissions

Depending on access rights each user will be able to perform certain tasks defined by his/her role in the system.

The system main roles are specified below:

User	Short Description
------	-------------------

Administrator	This user is a person with full access and control in the EDEN platform; he/she also manages access rights. He/she creates, manages and deletes the lists of User Groups and other Meta Data.
User	An individual authorised to use the System
Owner	The person who is responsible for the content of the document
IT Administrator	The person who has the permission to add users to the System and delete user groups
Special user	Has the permission to highlight a document for deletion, he/she will not have the right to delete any documents. The four eye principle takes effect by allowing marking a document for deletion as a first step toward document deletion. Special User marks documents for deletion as a Step1 of two-step process.
Super user	This role is reserved for a user with special access permission that allows additional access to, and / or control over, document contained in the system. He/she has the permission to delete a document from the System. Super User marks documents for deletion as a Step 2 of two-step process.
Public User	This is a basic role for every user of EDEN platform, giving access and permitting standard functions to be performed on documents. He/she has access to document classified as Unrestricted with a read only access.

## 3. Login to EDEN system

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This section describes the login process to the EDEN Portal.

### 3.1 Launch the EDEN Portal

1. Launch your internet web browser on your desktop
2. Insert the URL for the EDEN Portal into the URL field of your browser and hit 'Enter'.

For the **Test** EDEN Portal the URL is:

<https://EDEN.test.eba.europa.eu/>

See Figure 1 below

For the **Production** EDEN Portal, the URL is:

<https://EDEN.eba.europa.eu/>

Figure 1: EDEN Portal login screen

## 3.2 Log in and log out of the EDEN Portal

1. Enter your *username* into the User name field
2. Enter your *password* into the Password field
3. Click OK
4. To log out choose Sign Out at top right corner

## 3.3 Changing the password

The username and password to EDEN are identical to user credentials of Windows system .In case user's password expired; he/she is prompted to change the credential. The new credentials shall be used to log in to EDEN portal.

# 4. Dashboard

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## 4.1 EDEN home screen

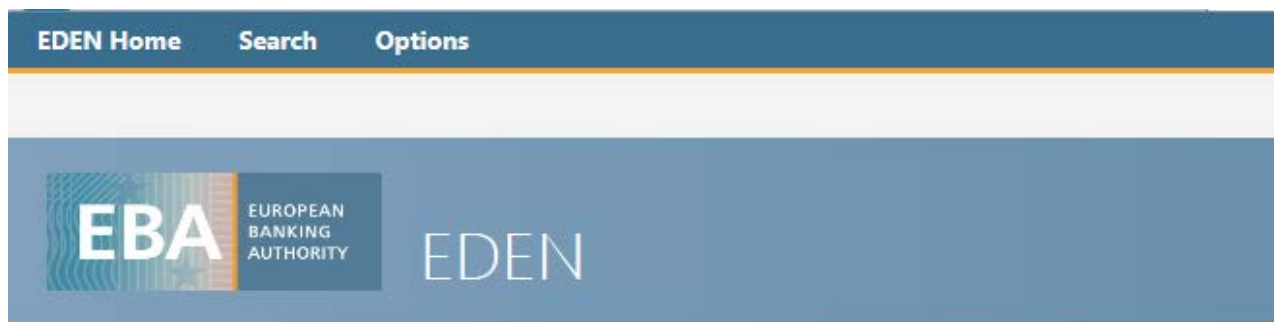


Figure 2: EDEN Portal Home screen balk

Upon logging in to the portal, each user will be redirected to EDEN Home page. The Homepage navigation panel has three main functionalities:

**EDEN Home** button – by clicking Home button you will be redirected to Home Page (start page)

**Search** button – by clicking on it a new window pops up with search criteria to be filled in. The user can search for any document in the system using this functionality. The search criteria will retrieve all search documents for which the user has permissions for.

**Options** – currently this button allows you to save all searched criteria you have used when searching for a document.

## 4.2 My Dashboard view

The functions on the dashboard are grouped in several main tabs and depending on the access rights users are able to perform additional actions on documents.

Every user, upon logging in will see the view of his/her own dashboard.

Permissions to view documents are dependent on the role the user has in the system.

#### 4.2.1 Standard User's dashboard view

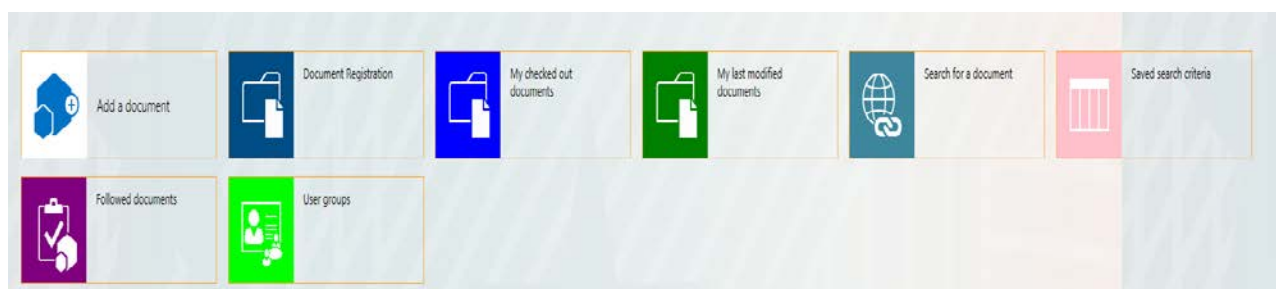


Figure 3: Main dashboard view for Standard User

#### 4.2.2 Super User's dashboard view



Figure 4: Main dashboard view for Super User

#### 4.2.3 Special User's dashboard view

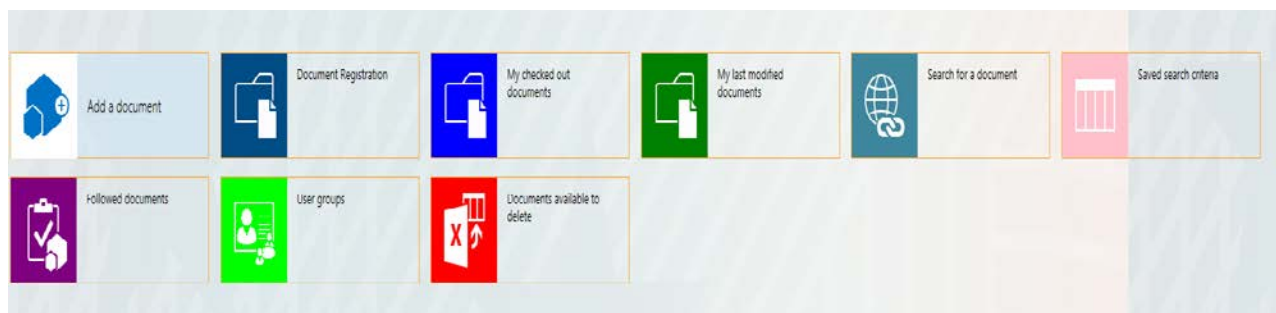


Figure 5: Main dashboard view for Special User

#### 4.2.4 Administrator's dashboard view



Figure 6: Main dashboard view for Administrators

Every user, upon logging in to the EDEN system is directed to his/her dashboard. Each view of the dashboard is unique and represents his/her last modified documents and corresponding actions (user role dependant). The dashboard view show both registered and unregistered document in the system.

All **registered** documents have their unique **Document ID** assigned by a system.

Figure 7: User's last modified documents on the main dashboard view

Documents that are **not yet registered** in the system do not have the unique document ID number.

Figure 8: User's main dashboard view – document pending registration. No Document ID assigned

The maximal number of documents shown on a page is 10.  
Navigate with arrows next to page number to see more documents.

## 4.3 Main functionalities on Dashboard

### 4.3.1 Add a document

This functionality is available to all users regardless of their access control rights.

It allows adding one or multiple documents to the system. Various types of document format i.e. Word, Excel, PowerPoint, PDF, Visio, MSP, PPT are supported.

In order to add documents follow below steps:

1. Click on the icon to add a new document into the system. Upon clicking the icon, user will be redirected a Drop Off library page.

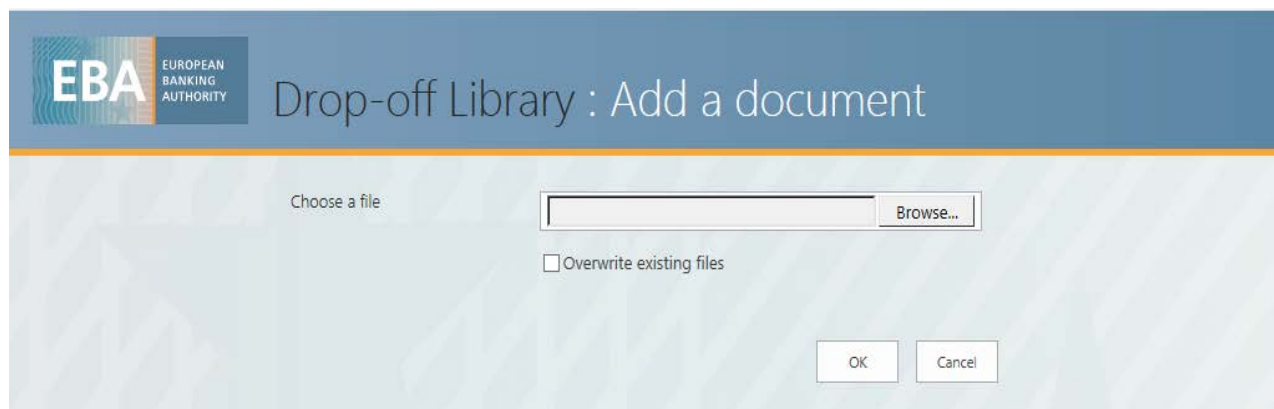


Figure 9: Drop-off library view when adding a document

2. Next, click on **Browse** button and choose a file to upload from a local or shared drive. Next double-click on the chosen document and then click **OK**.

Figure 10: Drop off library – choosing a file for upload



**Attention** Pay attention to the following message at the top of the screen, informing you that the document was uploaded successfully and is checked out to you. This information carries a notion of further action the user will need to perform in order to fully make the document present in the system.


 The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.

Figure 8: System message upon successful upload of a file to a drop off library.

3. Fill in Metadata identifying the document. Fields with an asterisk (\*) are mandatory. The form should be filled in as detailed as possible.

Mandatory and non-mandatory fields are either free text fields or a drop down menu from which appropriate value can be chosen.

4. Once the metadata fields are completed, click on button **SAVE**.

### 4.3.1.1 Document Metadata Explained

Documents in EDEN system are uploaded and maintained by users.

In order to better store, maintain and retrieve each document a metadata fields need to be filled in when uploading a document into the EDEN system.

The standard metadata fields for each type of document are available through drop down menu and are as follows:

**Classification** – This field is mandatory because every document needs to be classified. The document owner sets the classification level. The classification is by default set to EBA Unrestricted. Choose other classification levels from drop down menu.

**Taxonomy Classification** - Indicates the related function or activity, and links the document to a retention period. Please see the eDEN Metadata Dictionary for advice on implementation, and the Taxonomy and Retention Schedule for the full list of classifications.

**Area/Business Function** – This field is not mandatory. The document owner can choose one relevant business area from a drop down list.

**Document Type** - This field is mandatory, the document owner can choose a relevant document type from a drop down list.

**Subject** - This field is mandatory and the system does not pre-fill the metadata so the owner can choose relevant subject from a drop down list.

**Object** – This is not a mandatory metadata and is a free text. There is no drop down menu to choose from.

**Name** – It is a mandatory field and the system takes automatically the name of the file from the drive. The file extension is carried over as well.



**Notice** – The name = title of the document. This field cannot be updated when uploading a document. It can however be changed when creating new version(s) of this document.

**Committee** - This field is not mandatory; the document owner can choose a relevant committee from a drop down list.

**Document Source** - This field is not mandatory; can be chosen between internal source and external source from the drop down list.

**Status** – This is a pre-filled metadata as each document uploaded is has a status of a draft. The owner can change from a drop down list.

**Recipient** - This is not a mandatory metadata and is a free text. There is no drop down menu to choose from.

**Document date** - This field is not mandatory. Represents a creation date of the document (if applicable).

**Reference date** - This field is not mandatory. Represents a reference date in the document (if applicable).

**Closure date** - This field is not mandatory. Represents a date set by document owner for deletion.

**Internal reference number** – This field is not mandatory. The Document owner may assign an internally followed reference number.

**External reference number** - This field is not mandatory. Represents a reference number in the document (if applicable).

**Protected/sensitive Personnel marker** – This field is not mandatory. Marked documents are of sensitive content; documents marked as sensitive must be properly classified and permissions must be set.

**Administrative Retention Period** - This field is not mandatory and is a free text field.

**Language** - This field is not mandatory and represents the language in which document is written. It is automatically set to English.

**Comment** – This field is not mandatory and is a free text field.

**Enterprise Keywords** - This field is not mandatory and is a free text field.

Figure 11: Individual document - Metadata screen after upload of a file

### 4.3.2 Add multiple documents (bulk upload)

Each user can also upload multiple files at once and the extensions of those files do not need to be the same (PDF, Word, Excel etc.).

Follow the below steps to upload multiple files at once:

1. Click on **Document Registration** tab on the main dashboard

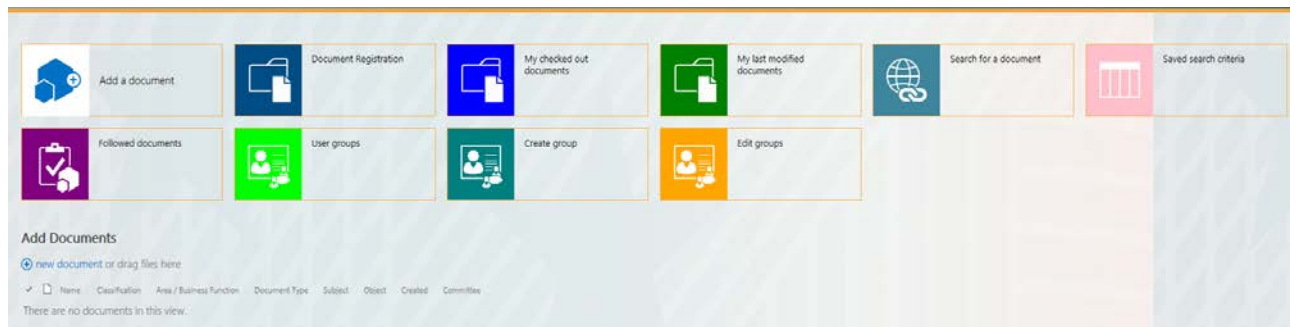


Figure 12: Internet Explorer – local files storage

The next step requires action outside of EDEN system:

2. Click on Windows Explorer icon
3. Search for files you want to upload in the correct location. Ensure your files are stored in one location (e.g. P drive or desktop etc.)
4. Press Ctrl continuously and mark the files by left click of the mouse

Figure 13: Internet Explorer – local files storage

5. Once the files are marked, left click on them with your mouse and when holding it change to EDEN screen ( drag the files)
6. Direct the mouse pointer to the field under **Add Documents** tab and release the left mouse click (drop the files)

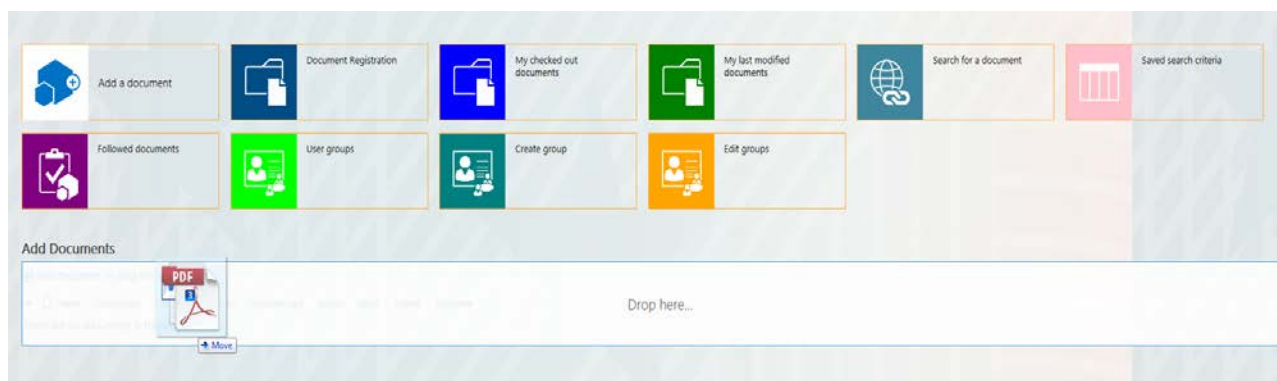


Figure 14: Drag and drop multiple files to drop off library

7. The drag and drop action of multiple upload is now completed.
8. All files uploaded in a bulk upload are now in a Drop Off library

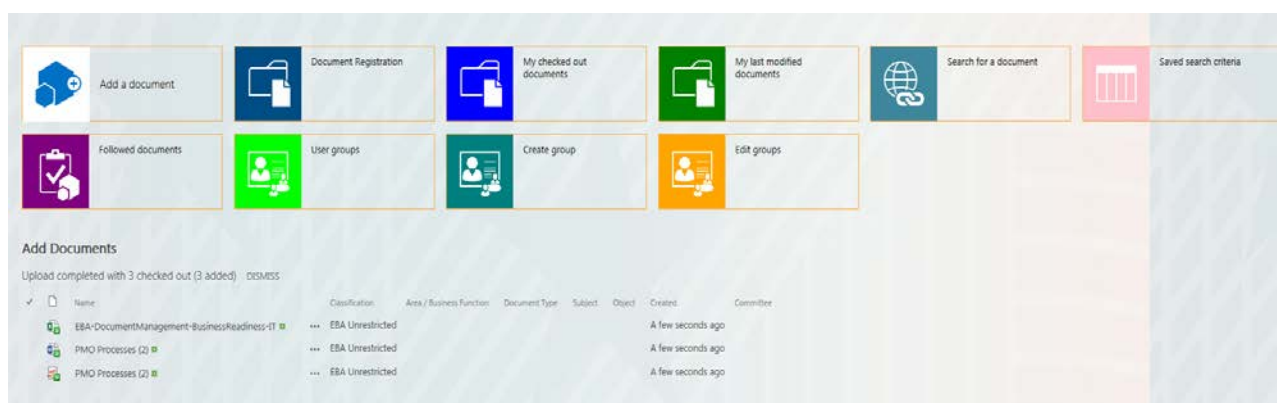


Figure 15: Document Registration view – file pending registration



**Notice** Add Documents tab on Document Registration screen. By clicking Add Documents the user will not be able to upload multiple documents. Those will need to be brought into the system by “drag and drop” action (bulk upload).



**Attention:** Files in Drop Off library are not yet registered and are checked out to the user who performed the upload.

### 4.3.3 Document Registration

Documents uploaded to EDEN system Drop Off library still need to be registered.

Upon completion of metadata fields, a new system notification is screened onto user’s dashboard

This notification is automatically generated by the system and informs the user that document(s) is/are pending registration.

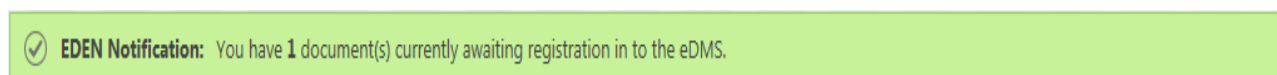


Figure 16: System message – request for registration of a file



**Attention:** Registration of documents should follow with managing of permissions.

Bulk upload of documents follows with registration however when bulk loading documents permissions must be set to each and every document, in the **Document Registration** step.



Figure 17: Dashboard view – file pending registration

Follow the steps in order to register a document into the EDEN system:

1. Click on **Document Registration** tab
2. Find the document you want to register and open the menu by clicking on the three dots next to the document



**Notice** Documents that are pending registration are *in the Drop Off library and thus* visible to the document owner only.

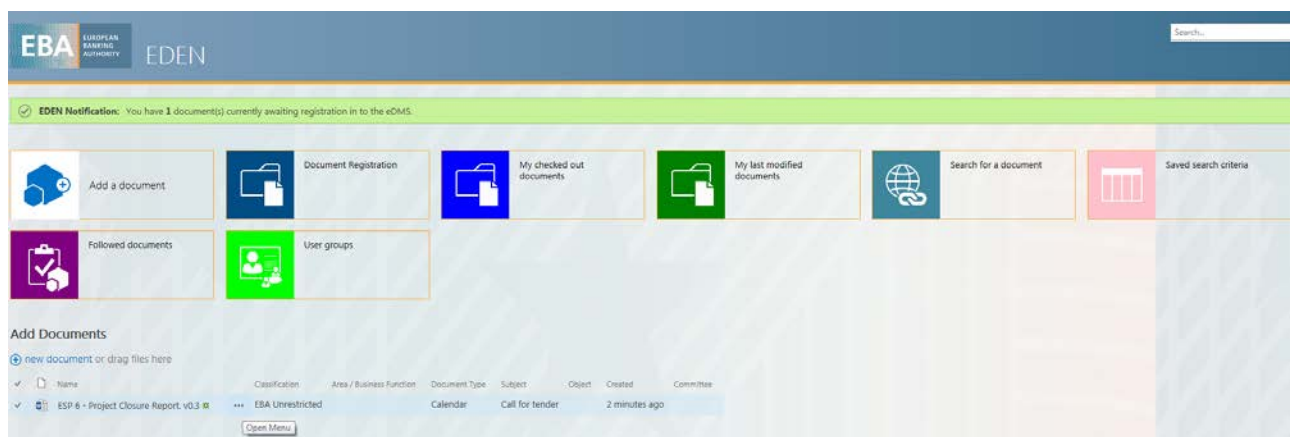


Figure 18: Document Registration view – file pending registration

3. A small window with a view of the document will pop up, the user clicks again on the three dots next to OPEN command
4. A small preview of the document is shown. Next click on the three (3) dots right next to OPEN tab.

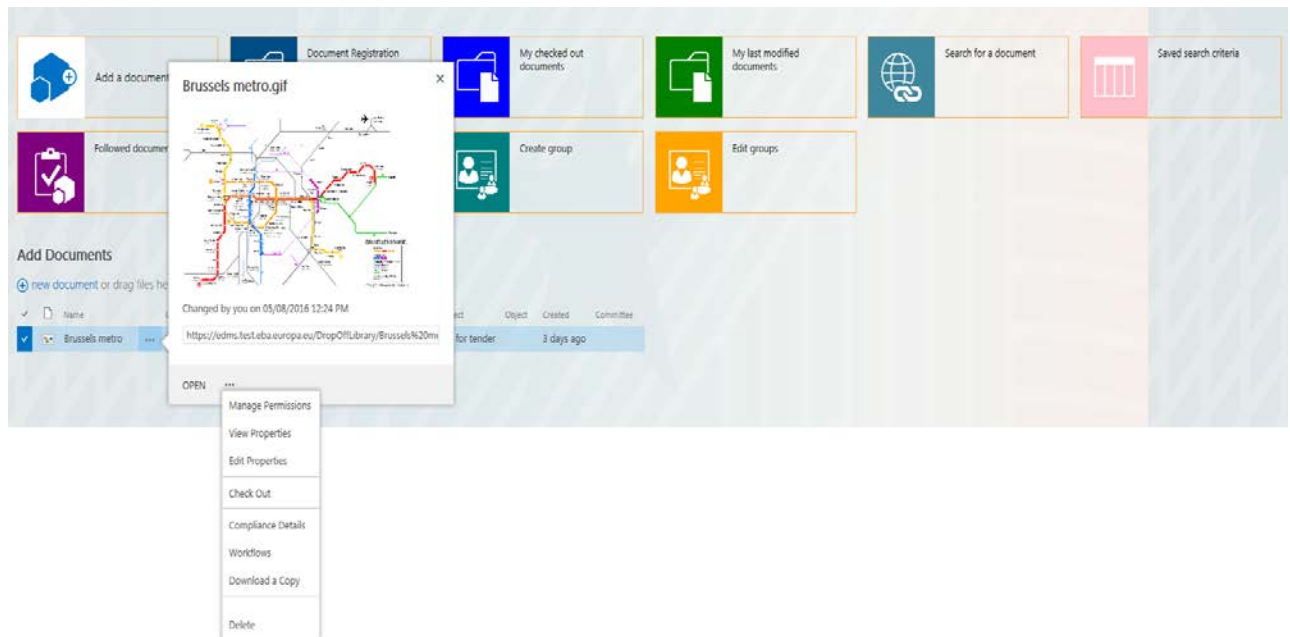


Figure 19: Menu option for registering the document



**Attention:** Ensure that access to document(s) is limited to specific users and / or user groups. Document authors need to limit access further by assigning users / users groups to a document at time of creation.

For this reason Managing Permission after registering the document is crucial.

5. Click on **Manage Permissions** - first option from the drop down menu
6. Each EBA permissions group option has a drop down menu to set the right permissions:
  - Read – the user (owner of the document) gives access rights to other users to read the document.
  - Contribute – the user (owner of the document) gives access rights to other users to read and contribute to the document.
7. Click on SAVE PERMISSIONS button
8. After some short time elapse (system processing in the background) the document is registered in the EDEN system with its unique document ID number, title and main metadata.



**Notice** The owner of the document can change the permission rights at any time throughout the life cycle of the document. The permissions can also be set on individual person's level to READ or CONTRIBUTE.



**Attention** Permissions for document marked for deletion cannot be modified.

Figure 20: Menu option for managing permission for a document

Figure 21: Dashboard menu showing registered documents in the system

#### 4.3.4 Documents Bulk Registration

Follow the steps to fill in metadata for the uploaded bulk of documents:

1. Go to **Document Registration** tab on the main dashboard
2. Click on the items tag to select all items
3. Click on LIBRARY tab at the top left corner of the screen

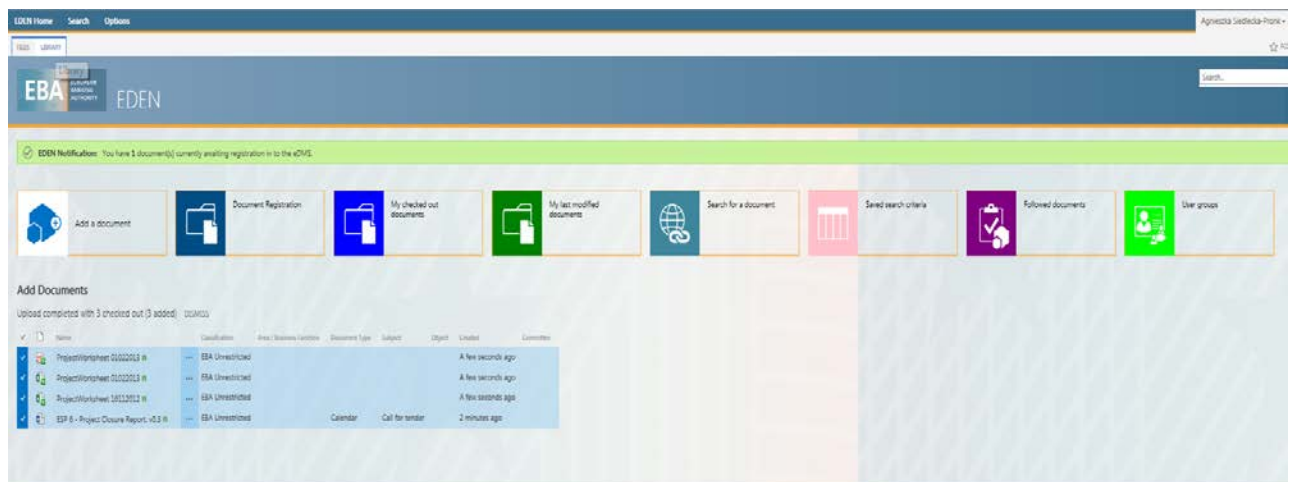


Figure 22: Document Registration view – bulk files pending registration

4. Choose option to Quick Edit the documents. Quick Edit gives the possibility to manage items on the list using the spreadsheets format. The user can bulk edit the item properties while using this view.
5. The bulk edit gives the opportunity to edit only certain metadata fields “at one go”: Classification, Area Business Function, Document Type, Subject and Object as well as Committee.
6. Click on drop down tag to choose appropriate values from the menu or type in the values ( must be values existing already in the metadata pool of values)
7. Just like in case of Ms Excel, in order to apply the same value to cells, place the cursor (mouse pointer will change to a cross) on the edge of the filled in cell and drag down to the end of the column.
8. Once all fields are filled in, click on STOP button to save all changes made.

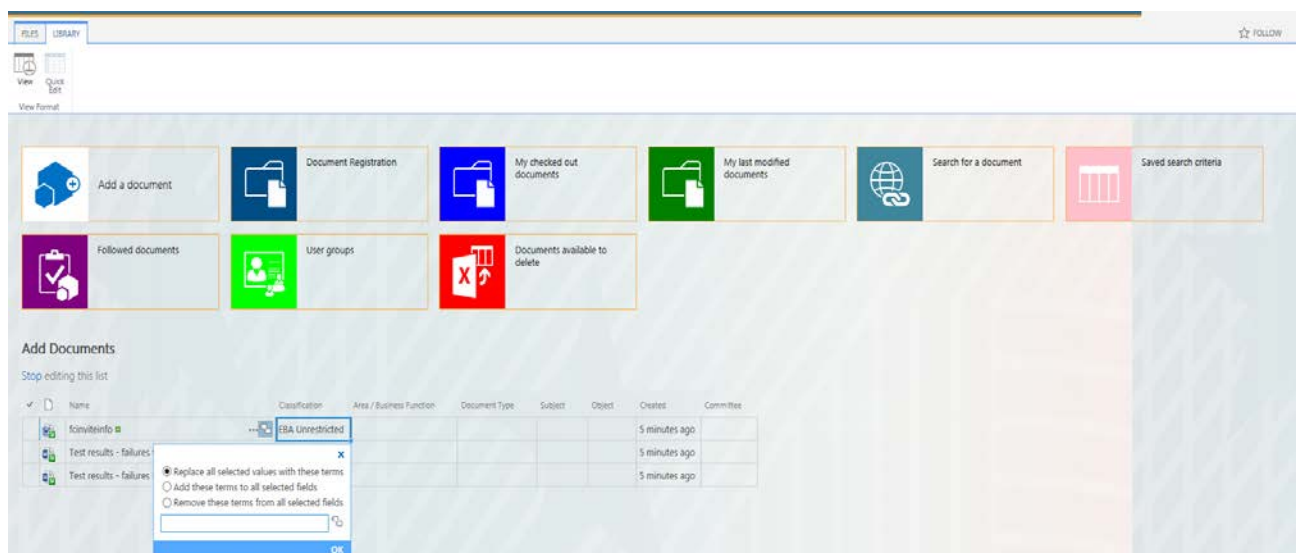


Figure 23: Document Registration view – bulk metadata completion



**Notice** At this level of metadata editing the user can still change the entries on individual document level.

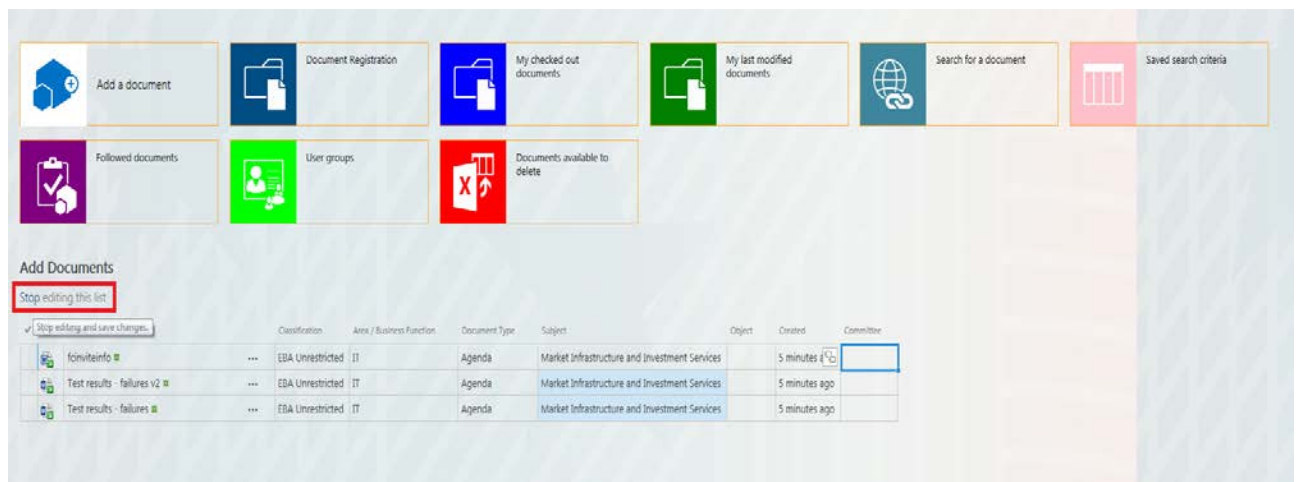


Figure 24: Bulk document metadata completion – stop editing to save changes

9. Check in all documents into EDEN system. Click on FILES tab in top left corner of the screen
10. Choose Check in option.
11. A new Check In window pops up, user can comments in the comment box
12. Click OK button to complete all actions

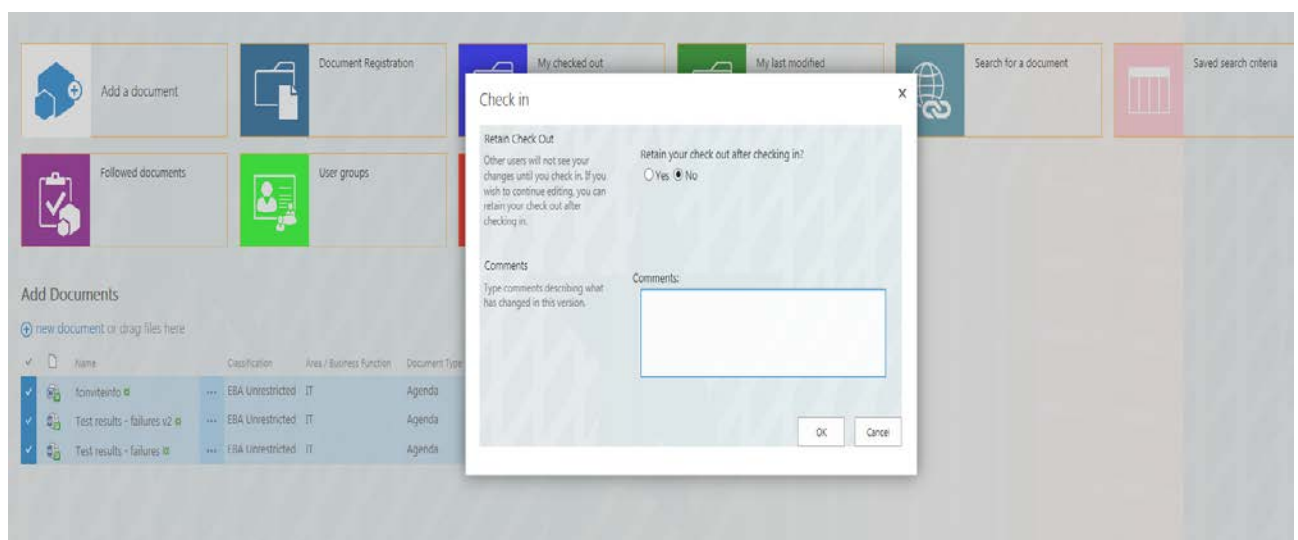


Figure 25: Bulk documents registration – Check in window



**Attention:** It is suggested to restrict access only on a “need to know” basis and if it is necessary.



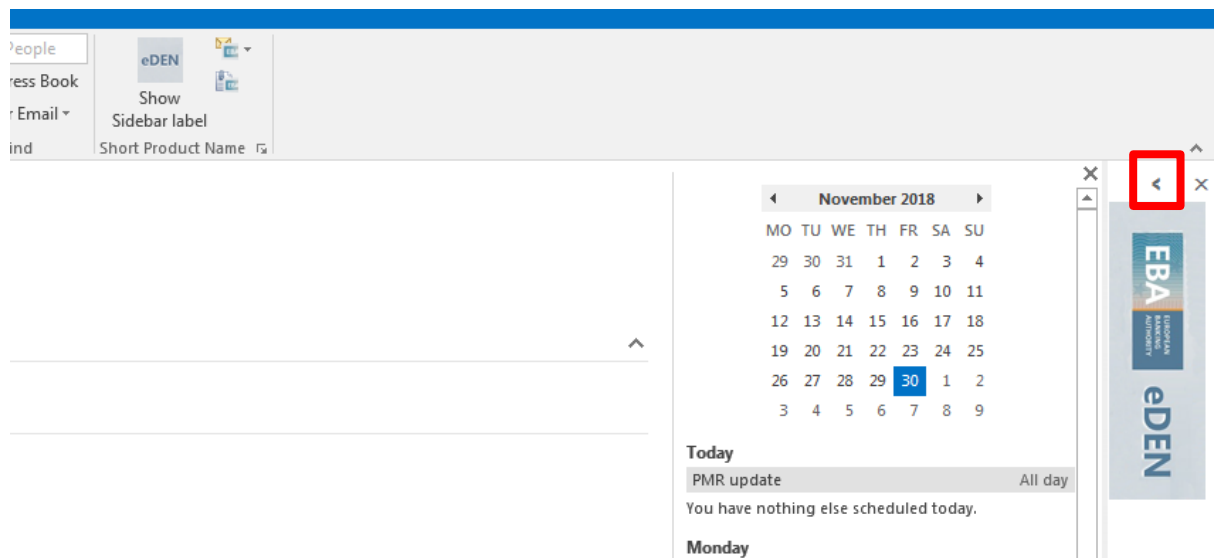
**Attention:** Set permissions to User Groups rather than to individuals.



**Attention:** After bulk upload **setting permissions** must be done for each document separately.

### 4.3.5 Uploading a Document Directly from Outlook

1. Open the eDEN sidebar in outlook by clicking the arrow



2. Drag an email from your inbox to the 'drop-off library' window

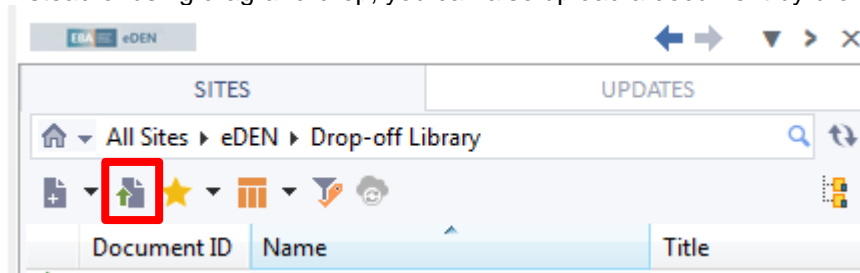


3. The metadata form will be displayed in the outlook window. This should be filled here. Then click 'save'.

4. Go to eDEN to set permissions on each uploaded document

It is possible to upload an email; an attachment; an email together with an attachment; or multiple items simultaneously. When uploading multiple items, the metadata form can only be filled once – all items will be given the same metadata values.

Instead of using drag-and-drop, you can also upload a document by browsing. Click this icon to browse:



### 4.3.6 My checked out documents

This tab is a quick gateway to look up all documents that are checked out to a user.

Figure 26: Checked out documents view

By clicking on **My Checked out Documents** tab from the main dashboard, the user will be redirected to a dashboard view with lastly modified documents.

On the main User's dashboard each icon represents the status of documents. The user can look up checked out documents also from the Dashboard view. Green downwards arrow indicates checked out documents.



**Notice** The column on the main bulk: **Checked Out To** which is visible from the main dashboard. This column shows a name of a person who checked out the document (and is currently working on it).

Figure 27: Dashboard view showing checked out document

### 4.3.7 My last modified documents

By clicking on **My Last Modified Documents** tab from the main dashboard, the user will be redirected to a dashboard view with lastly modified documents



Notice the view of My Last Modified Documents is the same as your main Dashboard view.

### 4.3.8 Search for documents

EDEN system has a powerful search engine and user can use many search criteria in order to find a document.

1. On the main dashboard choose **Search for a Document** tab.
2. A new pop up window will show with various search criteria

Figure 28: Dashboard view showing checked out documents

3. Select a value from a drop down menu to search from. The right hand side menu next to metadata fields is expandable.

The screenshot displays the EDEN search main screen with the following elements:

- Document ID:** A text input field.
- Title:** A text input field.
- Area:** A text input field with a small expandable icon on its right side.
- Classification:** A text input field with a small expandable icon on its right side.
- Document Type:** A dropdown menu with a small expandable icon on its right side.
- Subject:** A dropdown menu with a small expandable icon on its right side.
- Search:** A button located below the input fields.
- Show more options:** A button located to the right of the Search button.

A black arrow points to the expandable icon next to the Document Type dropdown menu. A tooltip is visible over the Subject dropdown menu, displaying the text "Browse for a valid choice".

Figure 29: EDEN search main screen

The user can extend the search and use additional search values by clicking on **Show More Options**

Document ID	<input type="text"/>		
Title	<input type="text"/>		
Area	<input type="text"/>	Document Type	<input type="text"/>
Classification	<input type="text"/>	Subject	<input type="text"/>
Internal Reference Number	<input type="text"/>	External Reference Number	<input type="text"/>
Protected / Sensitive	<input checked="" type="radio"/> Any <input type="radio"/> Yes <input type="radio"/> No		Personnel Marker <input checked="" type="radio"/> Any <input type="radio"/> Yes <input type="radio"/> No
Object	<input type="text"/>	Document Source	<input type="text"/>
Status	<input type="text"/>	Owner	<input type="text"/>
Recipient	<input type="text"/>	Document Date	On or after <input type="text"/> On or before <input type="text"/>
Reference Date	On or after <input type="text"/> On or before <input type="text"/>	Closure Date	On or after <input type="text"/> On or before <input type="text"/>
Administrative Retention Period	<input type="text"/>	Post Administrative Retention Action	<input type="text"/>
Comment	<input type="text"/>	Language	<input type="text"/>
Committee	<input type="text"/>	Modified By	<input type="text"/>
Modified Date	On or after <input type="text"/> On or before <input type="text"/>	Created Date	On or after <input type="text"/> On or before <input type="text"/>
<input type="button" value="Search"/>			

Figure 30: EDEN expanded search screen

The screenshot shows the EDEN expanded search screen with a modal dialog box titled "Select: Add Terms" open. The dialog box has a close button (X) in the top right corner. It contains a list of criteria under the "Area" category, which is currently selected. The criteria listed are: Communications, Consumer Protection, Financial Innovation and Payments, Corporate support, EBA, EBA Accounting Function, Finance and Procurement, HR, IT, Legal, and Oversight. Below the list is a "Select >>" button and a text input field. At the bottom right of the dialog are "OK" and "Cancel" buttons. The background search form is dimmed, showing the same fields as in Figure 30.

Figure 31: EDEN expanded search screen – drop down menu AREA criteria

4. Choose appropriate metadata from the drop down menu. Navigate vertically using arrows. Double click on the chosen value and it will appear in the search criteria window

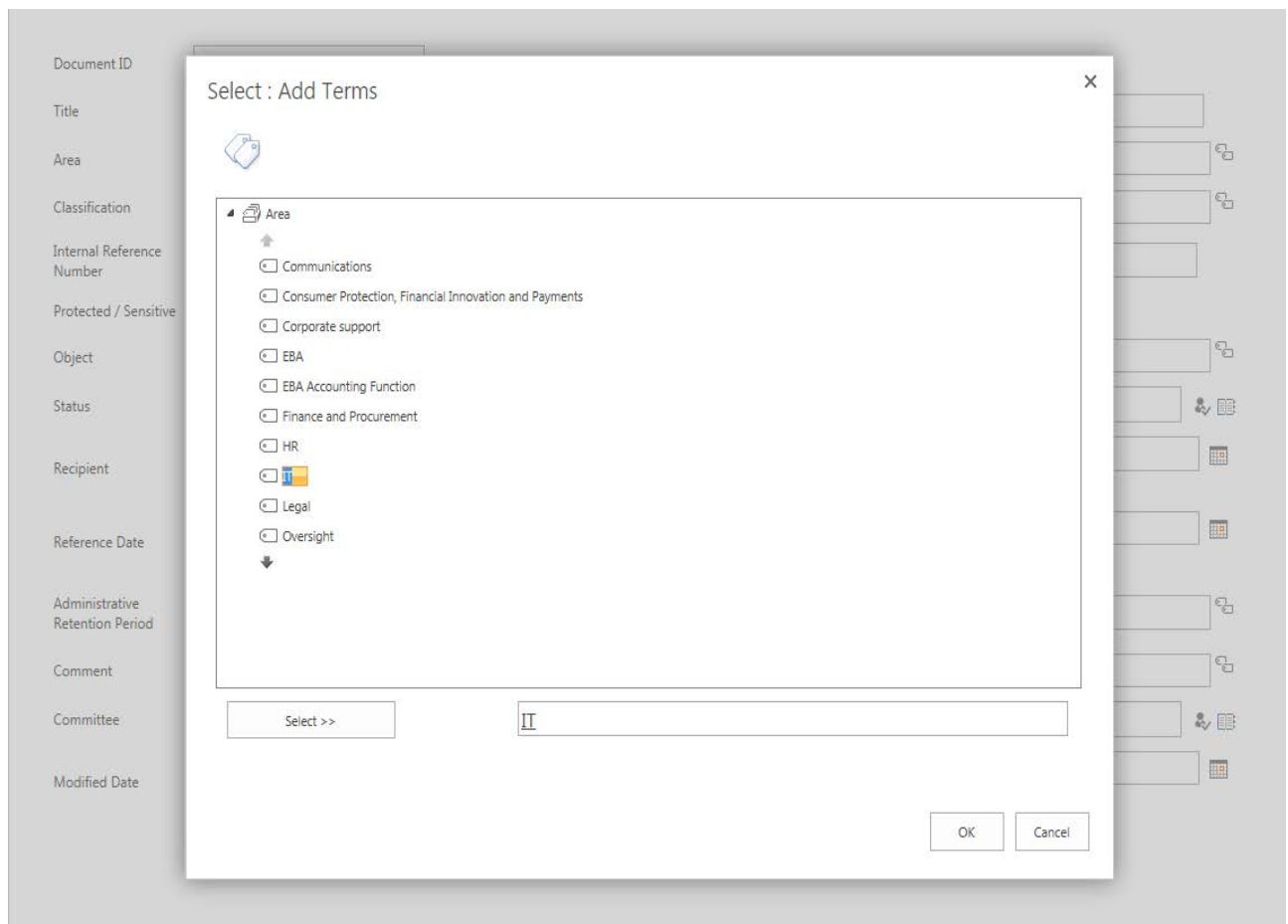


Figure 32: Search advance option - Chosen value from drop down menu for "Area" criteria

5. Click OK and afterwards press Search button

Figure 33: Search result



Notice: The search criteria will allow for retrieval of all documents that have at least one search value completed. The more search values are filled in, the better and more narrow (specific) the search result will be.

The user can further narrow down the search criteria even after the initial search results are shown.

The options shown on the left hand side are allowing for specifying the search.

6. Click on the value or expand the value options by clicking Other Value.
7. Finally click APPLY button.
8. The search is now narrowed to additional search values.

Figure 34: Search result – additional search options

#### 4.3.9 Saved search criteria

Every user has access to the functionality of saving his/her own search criteria. This functionality enables a quick and efficient retrieval of documents with criteria previously specified and saved in the past. By saving the search criteria, user does not need to fill in search metadata fields each time of search but rather use the saved search options.

In order to set up specific search criteria the following steps should be followed:

1. Click on **Saved Search Criteria** tab
2. A new pop up window will appear and it will be empty (no previous search criteria saved)

Figure 35: Saved search criteria screen - no results

3. Follow the steps (paragraph 4.3.5 from step 1 to 5) filing in search data.

Once the searched documents are retrieved the user can save the searched criteria.

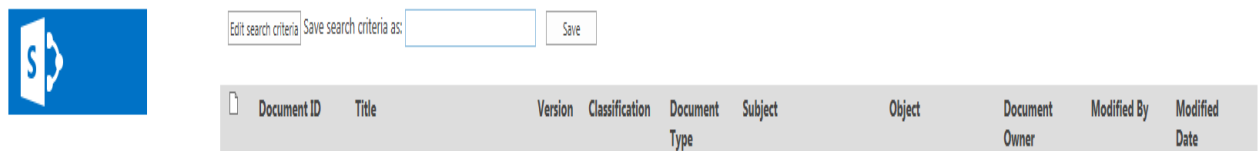


Figure 36: Search result – save the search balk

Afterwards, follow the steps:

4. At the top of the screen underneath the blue menu the user gives names of his/her search criteria.

Figure 37: Search result – save the search balk full screen



**Notice:** Any name given to a search criterion is acceptable, including numbers.

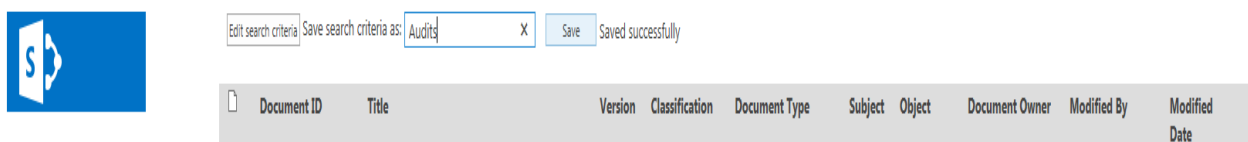


Figure 38: Search result – save the search balk with specified name

5. Click button SAVE
6. To check your saved criteria go back to main dashboard of EDEN system by clicking EDEN Home on the blue balk top left corner
7. Click on the **Saved Search Criteria** tab to retrieve saved search criteria

Figure 39: Search result – saved search criteria

Each saved search criteria can be updated at any time by clicking on the name of the saved search and adjusting (adding or deleting previously preferred search values).

8. To delete saved search criteria just click on the cross next to its name

#### 4.3.10 Followed documents

This functionality allows checking what documents are being followed by a user. The user does not need to be the owner of the document in order to follow it. This functionality allows user to access documents that are used regularly. This however does not mean that every document used would be followed by the user. Documents added to the drop off library but not registered in the EDEN system cannot be followed.

Proceed with the steps to follow a document:

1. Go to main dashboard or click on **My Last Modified Documents**
2. Choose the document you want to follow by pointing your mouse on the subject line
3. Side bar menu for a document will show options for actions for this specific document
4. Choose option Follow to start following the document.

Figure 40: Document side bar menu– Follow

- The system will generate a little pop up window in the top right corner “Now following this document”



Figure 41: System generated message – Document is being followed

- Click again on **Followed Documents** tab to check followed document(s)



Figure 42: Followed Documents screen



**Notice:** To stop following document: click on **Stop following** underneath the link with Document title

### 4.3.11 User groups

This tab gives an overview of user group he/she belongs to.



Figure 43: User Groups screen – Groups you are part of

Click the link of User Group to see all members to the User Group

Figure 44: User Groups screen – All members of a User Group

#### 4.3.12 Create Groups ( for Administrators)

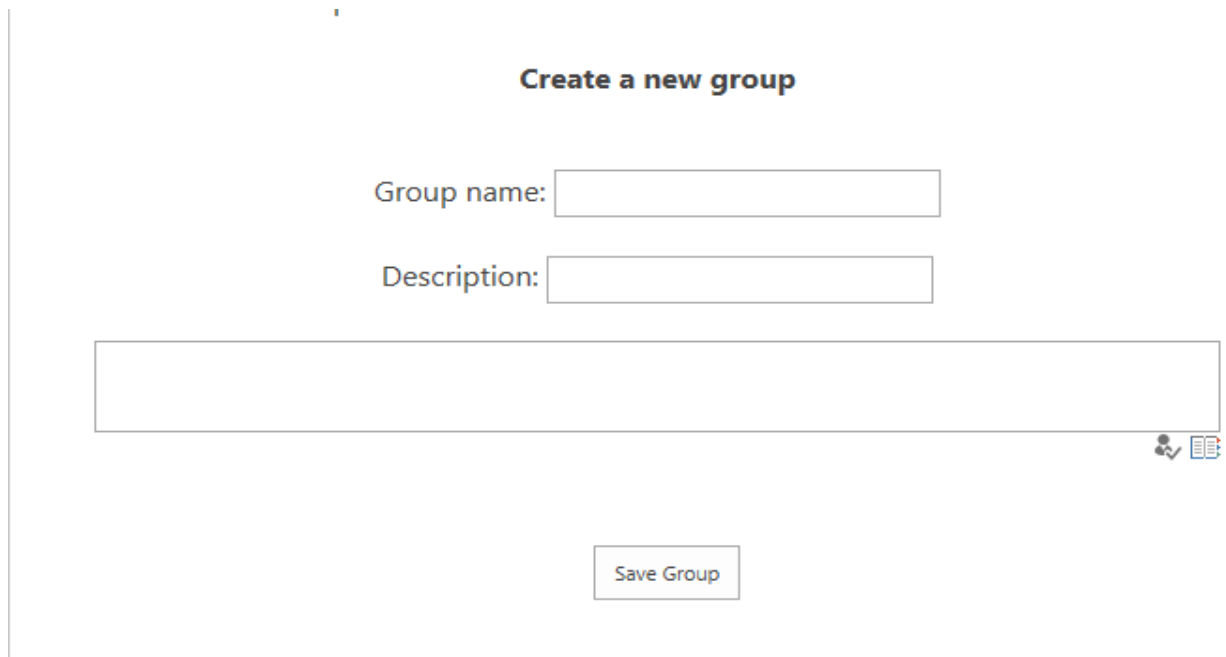
EDEN relies on the active directory of IT systems to populate data on users (first name, last name and login). All EBA employees have access to EDEN.

All EBA Employees belong to one or more user groups.

User Groups are created and maintained by the **EDEN Administrator**, an individual who is responsible for creating user groups and profiles.

Follow the steps to create user group:

1. Click on **Create Group** tab on the main dashboard
2. A new window will show Create a new group
3. Fill in Group name and description fields



**Create a new group**

Group name:

Description:




Figure 45: Create Groups tab – Create a new Group window

4. Next add people to the User Group by clicking on the bottom right book icon
5. New screen Search People will allow adding individuals to the User Group. Type in first name and click search button
6. Double click on the name to add it to the group.
7. Click Save Group to save all changes

Figure 46: Create Group – Search people window



**Notice:** User Group must have at least one user member.

### 4.3.13 Edit Groups ( for IT Administrators)

All names in groups are populated from the Active Directory administered by IT Department. In this context any change to name must be done in Active Directory first for this to take effect in EDEN.

To edit [add or delete member(s)] user groups follow the steps:

1. Click on **Edit Groups** tab on the main dashboard
2. A new pop up window "Edit Groups" will appear with existing ( if previously created) names of groups and members belonging to each group

Figure 47: Edit Group membership Window

3. To add members to existing Group click on the book icon underneath membership screen(s). Browse by clicking on the small book icon to select people from the active directory list.  
Type in first name in FIND field and click on the search button

Figure 48: Select people screen – Edit Groups

4. Once members are added, click **SAVE MEMBERSHIP** at the bottom of the screen. The system will remain on the screen with a message **Membership successfully saved**
5. Close the dialog window to return to dashboard view



**Notice** The Edit Groups tab is allowing to view specific group settings or permissions assigned to the group.. Those can be checked by clicking on a group name .

By clicking on **SETTINGS** , the user can view group settings and group permissions.

To delete member(s) from a group:

1. Click on the User Group name
2. Tick the box next to members' name you need to remove from the group
3. Choose Actions tab
4. Choose **Remove Users from Group**

Figure 49: Edit Groups - People and Groups – view group settings

5. A warning message will show on a screen. Click OK to confirm deletion of a member.

Figure 50: System warning message – confirm to delete member of a group

#### 4.3.14 Documents available to delete (for Special Users)

Every document owner can request for a document to be deleted. This can be done by inserting the date from which the document has to be deleted into the metadata field '**Closure Date**' of a document.

Deletion of documents is based on four (4) eye principle. This means not one but two different people/roles are involved in deletion of a document – Special User (*Step 1*) and Super User (*Step 2*).



**Attention:** The document owner or user with appropriate permissions must first set a **Closure Date** in the properties of a document. This can be done at any time. The Closure Date is the date when the document will be deleted from the system.



**Attention:** Once the document went through *Step 1* (deleted by Special User) the document owner or other contributors cannot change any of the document properties or the content of the document.

All users that marked document(s) for deletion will be able to see this in document(s) properties.

The EDEN system marks all documents for deletion with a black cross next to the document(s) icon(s). This happens automatically but not immediately. The process runs in the system over midnight, hence marking(s) is/are visible the following day.

Figure 51: Document side bar menu – View properties

In Document **View Properties** one can check if a document is marked for deletion.

Figure 52: Document properties view – Document not marked as deleted

Figure 53: User view- List of documents marked for deletion

Special User will see the document marked for deletion a day after the date he/she entered the Closure Date for the document to be deleted.

Follow *Step 1* of Document deletion process:

1. Click on the **Document Available to Delete** tab
2. A new pop up window will show all documents marked to be deleted
3. Click on **DELETE** button next to document(s) you want to delete
4. Close the dialog window

Figure 54: Special User view- List of documents set for deletion – Closure date



**Notice:** Column **Closure Date** available to Special User. This is the Closure Date entered by user/owner in properties of the document set for deletion.

### 4.3.15 Documents available to delete (for Super Users)

The Super User is the second person involved in deletion of documents, as based on four (4) eyes principle. In this aspect, the Special User follows with *Step 1* of deletion process whereas Super User completes the process with *Step 2*.

The following describes *Step 2* of the process, for process of *Step 1* refer to point 4.3.13

Follow *Step 2* of Document deletion process:

1. Click on the **Document Available to Delete** tab
2. A new pop up window will show all documents marked to be deleted
3. Click on **DELETE** button next to document(s) you want to delete.
4. Close the dialog window. The document(s) is/are now permanently deleted from the system.



**Notice:** Column **Marked as available for deletion** are available to Super User. The Super User will see also Closure Date column. It is the date when Special User triggered *Step 1* of document deletion process. The owner and other users will have this document marked with a black cross on their dashboards.

Figure 55: Super User view- List of documents set for deletion – Marked as available for deletion by Special User

## 5. Processing of Documents

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Each document stored in the EDEN system can be updated, maintained by other users, and deleted. Each document has its own properties and permissions set and each has a menu of options for actions.

The menu for actions is visible to users however not all functionalities are equally available to all types of documents.

Certain functionalities will not be available to user based on the status of the document and also access rights of the user.

## 5.1 Actions on Documents

### 5.1.1 View or change Properties

Every document in EDEN system has its properties (metadata). These can be changed / managed by other contributors depending on the permissions set on the document level by the owner.

Figure 56: Document side bar menu – View properties

To view properties of a document follow the steps:

1. Click on the document you want to check properties of and a side bar menu will be shown
2. Next click on **View Properties**

Figure 57:–Document View properties view

To change document properties follow the steps:

1. Once you have opened the View Properties window, click on the **Edit Item** in the top menu bar
2. The system will show a warning message that the document you want to change first must be **checked out** from the system.
3. Click OK button to check the document out.



**Attention:** Title of the document is the only part of metadata that cannot be changed. The system will issue a warning message and change will not be saved.

Figure 58: Edit Document properties warning message

4. Update properties of the document
5. Click SAVE button to save all changes made
6. Click Check In button in the dialog window

### 5.1.2 Check In

**Check in:** this functionality provides the user with the ability to check the document back into the EDEN after edits or updates are completed. This provides the ability for other users to see the changes and the document becomes available to them for check-out, if they have appropriate permissions.

This functionality is available to documents that are already checked out from EDEN to a user. One needs to first check out a document in order to later on check it back in.



**Notice:** *Check in* and *check out* of a document is also done when editing the properties of a document.



**Notice:** Each time a document was checked out for editing, it will need to be checked in again. This process of checking out and back in creates new version of the document.

This functionality of versioning provides version integrity throughout the lifecycle of a document also records the changes to a document over time and users can recall specific versions later.

Check what documents are checked out. This can be done by clicking **My checked out Documents** or from the **My last Modified Documents** (main dashboard) view - checked out documents are marked with a downwards green arrow.

Figure 59: My checked out Documents view

Figure 60: My last modified documents view – checked out document

Follow the steps to check document in:

1. Go to either of the two locations showing Checked out documents
2. Point your mouse on the document and a document side bar menu will show various options for actions
3. Click on **Check in**

Figure 61: My checked out documents view – check-in action in document menu

4. Next the system will generate a warning message
5. Click OK

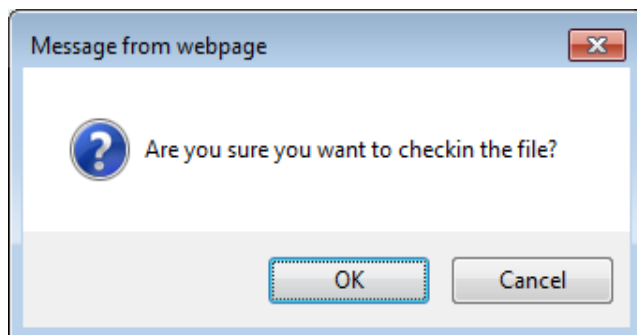


Figure 62: System warning message – Are you sure you want to checkin the file?

6. The document will be checked in to the system after a short minute and the green downwards arrow will disappear.

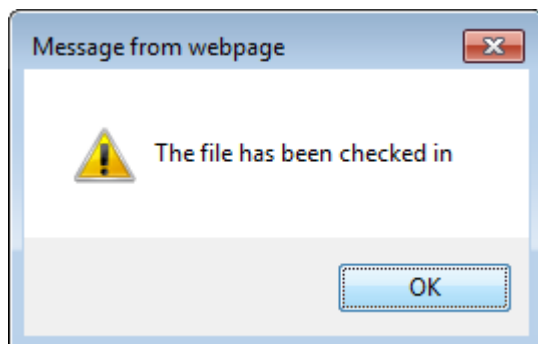


Figure 63: System warning message – File has been checked in

### 5.1.3 Download A Copy

This action can be performed on all documents stored in the system. Downloading a copy of a document will not check it out and the document in its original version will still be visible and accessible to people (permissions allowed).

Follow the steps to download a copy of a document:

1. Choose a document you want a copy of (My last modified documents or My checked out documents tabs)
2. Point with a mouse on the document to see document actions menu
3. Choose **Download a Copy**

Figure 64: Document actions menu - Download a copy

At the bottom of the screen a pop up message will appear



Figure 65: System message – Open or save “...” document

4. SAVE button has three options  
SAVE → SAVE AS → SAVE and OPEN
5. Choosing any of the three options saves the document
6. The system generates another pop up message informing that document download has completed.
7. Click OPEN to open the document directly or click OPEN FOLDER to see all the download(s)



**Attention:** All document are saved locally in local DOWNLOADS folder

### 5.1.4 Check Out

**Check-out:** this provides the ability to make changes to a document that resides in the system. Users can be sure that no one else can change the document while it is being worked on. This functionality provides the opportunity to edit a content of a document on or offline.

This functionality is available to almost every document in the system since editing the content or document properties require the document to be checked out first. Only **users** who do **have permissions** to contribute to the document are able to check it out for editing.

To check out a document follow the steps:

1. Find the document you want to check out via document search or in **My Last Modified Documents**
2. Point your mouse on the document and a document side bar menu will show various options for actions
3. Click on **Check out**

Figure 66: Document actions menu – Check out

4. The system generates a warning message to confirm you want to check out a document.
5. Click OK to confirm
6. The system generates confirmation message to user that the document is now checked out to him/her for editing.
7. This document appears in My checked out documents on main dashboard



**Attention** Copies of documents marked for deletion that went through *Step 1* of deletion process cannot be checked out ( see points 4.3.13 and 4.3.14)



**Attention** Each time a document is checked out and then checked in again, the version of the document changes to a version higher.

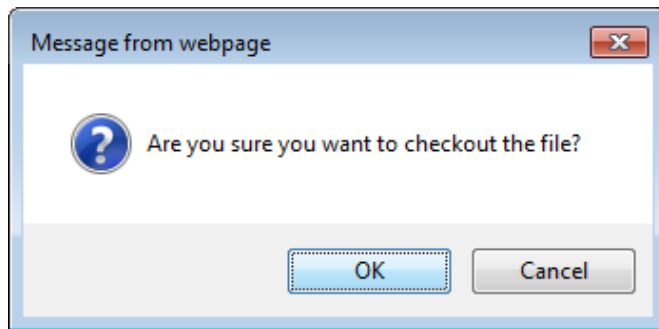


Figure 67: System warning message – Checking out a file

Figure 68: System information message – File is checked out for editing to “...”

### 5.1.5 Add New Version

This action is permitted on nearly all documents stored in the system, also the ones that are checked out. New version of a document should replace already existing document in the system. New version is stored (was maintained) locally or on a shared drive prior to upload to EDEN. Users who do have permission to contribute to a document are able to add new version.

To add new versions to a document follow the steps:

1. Find the document you want to add new version of via document search or in **My Last Modified Documents**
2. Point your mouse on the document and a document side bar menu will show various options for actions.
3. Click on **Add New Version**

Figure 69: Document actions menu – Add New Version

4. A new pop up window will appear on a screen. This will allow to upload a document as a new version of an existing document in EDEN.
5. Browse and choose the appropriate document from a local or shared drive. Comments may be added in the comment field.
6. Click OK.

Figure 70: Add New Version – search for document

7. As with upload of a new document, the screen with document metadata will show.  
Classification of the document, Area/Business Function as well as Subject and Title of the document are already prefilled. These are equal to metadata of the previous document version.
8. All metadata fields can be updated (changed). Click on drop down tags with each metadata field to choose the corresponding value. Complete free text fields.

Figure 71: Add New Version – Document metadata fields



**Attention** New version must maintain the same format of a document already in EDEN. In case user tries to upload new version of a document that is in fact a different document, the system will issue a warning message:

“ The file type of the document that you are trying to upload is incorrect.”



**Attention** Documents marked for deletion that went through *Step 1* of deletion process cannot have their version changed ( adinf new version is not possible) ( see points 4.3.13 and 4.3.14)



**Notice:** the system message at the top of the metadata field informing that the document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.

9. Open completion of the metadata field click OK
10. The document is shown in Last Modified Documents and is checked out to the user.
11. Follow steps to check in the document to EDEN system ( see 5.1.2)

### 5.1.6 Open and Edit

This functionality is active on documents that are checked in to the system and are editable. Documents that are set up as “read-only” will not be editable. Documents marked for deletion (and went through Step 1 – deleted by Special User) also cannot be edited anymore.



**Notice:** The main difference between Open and Edit the document vis-a-vis Add new Version is that opening and updating is taking place in EDEN directly. The document is checked out to the user editing it and other users do not have access to the content until the user has checked it in again.

Document that are checked out can only be *OPENED* but not *EDITED*

Follow the steps to open and edit a document in EDEN:

1. Find the document you want to add new version of via document search or in **My Last Modified Documents**
2. Point your mouse on the document and a document side bar menu will show various options for actions
3. Click on **Open and Edit**

Figure 72: Document actions menu – Open and Edit

Next the system issues a warning message informing the user that the document will be checked out if opened

4. Click OK
5. At the bottom of the screen a new message appears. The message prompts the user to either OPEN or CANCEL the command of opening the document.
6. Click OPEN



Figure 73: System message – Open or cancel opening “...” document

7. The document will open for editing.
8. Once ready, go to the document menu, click File and choose **Check In**

Figure 74: Document File – Check-In

New version of the document will be created once the file is checked in. The user can leave comments to the new version in the comments box.

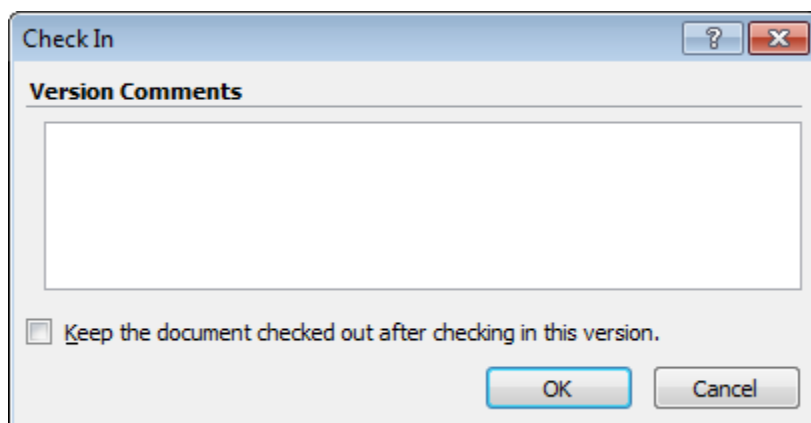


Figure 75: Document File –Version Comments box

### 5.1.7 Manage permissions

In EDEN system every document is its own entity. Permissions to view and to edit the content need to be set on every document separately

Registration of document(s) follow with managing of permissions.

Bulk upload of documents also follows with documents registration however management of permissions are performed individually to each document.

**Manage permissions** is accessible either from document side menu or when registering a document into the system (see 4.3.3)



**Attention** Document needs to be checked in.

Follow the steps to manage permission on registered documents:

1. Find the document you want to add new version of via document search or in **My Last Modified Documents**
2. Point your mouse on the document and a document side bar menu will show various options for actions
3. Click on **MANAGE PERMISSIONS**
4. Each EBA permissions group option has a drop down menu to set the right permissions:
  - Read – the user (owner of the document) gives access rights to other users to read the document.
  - Contribute – the user (owner of the document) gives access rights to other users to read and contribute to the document.
5. Click on **Save Permissions** button

The permissions can be set on individual person's level or User Group to READ or CONTRIBUTE (thus read as well).



**Attention** Documents marked for deletion that went through *Step 1* of deletion process cannot have their permissions level adjusted ( see points 4.3.13 and 4.3.14).

### 5.1.8 Add Overall Link

This functionality is permitted on documents that are checked in to the system and are not marked for deletion.

Relationship link is the relationship between the actual document and the annex document(s), resulting from the same subject matter or process.

While handling document users may add/link other document(s) to it so to create a “tree” of related documents. The relation between documents is not more than just creating a relation between them and no document takes precedence over the other. Each document uploaded to EDEN constitutes a standalone entity.



**Notice:** Linking a document to other document may involve an upload of a new document (not yet existent in EDEN) or linking already existent one. Both documents retain all their distinct attributes: title, classification level, unique document ID etc.

Follow the steps to add overall link to a document:

1. Find the document you want to add new version of via document search or in **My Last Modified Documents**
2. Point your mouse on the document and a document side bar menu will show various options for actions
3. Click on **ADD OVERALL LINK**

Figure 76: Document actions menu – Add Overall Link

A new search window will pop up where you can search for a document by its attributes.

4. Click on Show More Options to expand the search criteria

Document ID	<input type="text"/>		
Title	<input type="text"/>		
Area	<input type="text"/>	<input type="text"/>	Document Type
Classification	<input type="text"/>	<input type="text"/>	Subject
		<input type="button" value="Search"/>	<input type="button" value="Show more options"/>

Figure 77: Document actions menu – Search for a document

Next, find the document in the list of retrieved documents (if the user clicked on Search without choosing any criteria the system will retrieve all documents library).

5. Point the mouse to the document you want to link; document side bar menu will show one option
6. Choose **LINK**

Figure 78: Document actions menu – link

Main dashboard will be shown again.

7. Point your mouse to the document you linked document to see side document menu.
8. Choose **View Properties**
9. In the **View Properties** window at the bottom of the screen check Has Related Documents attribute
10. The status is **YES**

Follow the steps to check what document was linked:

1. Go to **My Last Modified Documents** or **Search for document tab**
2. Pont the mouse to document you want to for related document(s)
3. On the document side action menu choose **VIEW LINKED DOCUMENTS**
4. The linked document will be retrieved

Figure 79: Document actions menu – View Linked Documents

The user can also check the **parent document** in the side action menu of the retrieved document.

Figure 80: Document actions menu – View Parent Document



**Notice:** Linking document to a document carries the link throughout all its versions and visible in document history always in the current version of a document.

### 5.1.9 Add Link to This Version

This functionality is permitted on documents that are checked in to the system and are not marked for deletion.

Every time content of the document has changed, a new version of it will be available upon checking in.

While handling document users may add/link other document(s) to it so to create a “tree” of related documents. The relation between documents is not more than just creating a relation between them and no document takes precedence over the other. Each document uploaded to EDEN constitutes a standalone entity.



**Notice:** Linking document to another document's version carries the added document on the level of that version it was attached to and is visible in “parent” document history.



**Attention** Steps of adding a link to this version are identical to steps of adding overall link to a document (see 5.1.8).



**Attention** The user cannot link any document(s) to past version of a “parent” document.

**Linking to version must be taking place on a version level the document is currently on, hence the name Add Link to THIS VERSION.**

Later on if the document goes to next version number, the linked document will remain visible on a level of the version to which a document was linked to ( see 5.1.13 version history).

### 5.1.10 Copy URL Link

Every document in EDEN is stored in the system as a standalone entity. This functionality can be performed on documents that are either checked-in or checked out. It allows the user to send by email a hyperlink of a specific document to another user.

There is no need to communicate the title or document ID additionally.

Follow the steps to copy and send document URL link:

1. Find the document you want to add new version of via document search or in **My Last Modified Documents**
2. Point your mouse on the document and a document side bar menu will show various options for actions
3. Click on **COPY URL LINK**

Figure 81: Document actions menu – Copy URL Link

Next step requires action outside of EDEN system

4. Go to your mailbox
5. Click on new message and paste (Ctrl +V) the link to the body of a new message
6. Add addressee and send

The addressee will receive a message with a hyperlink to the document and upon clicking the following dialog window will appear showing downloaded documents.

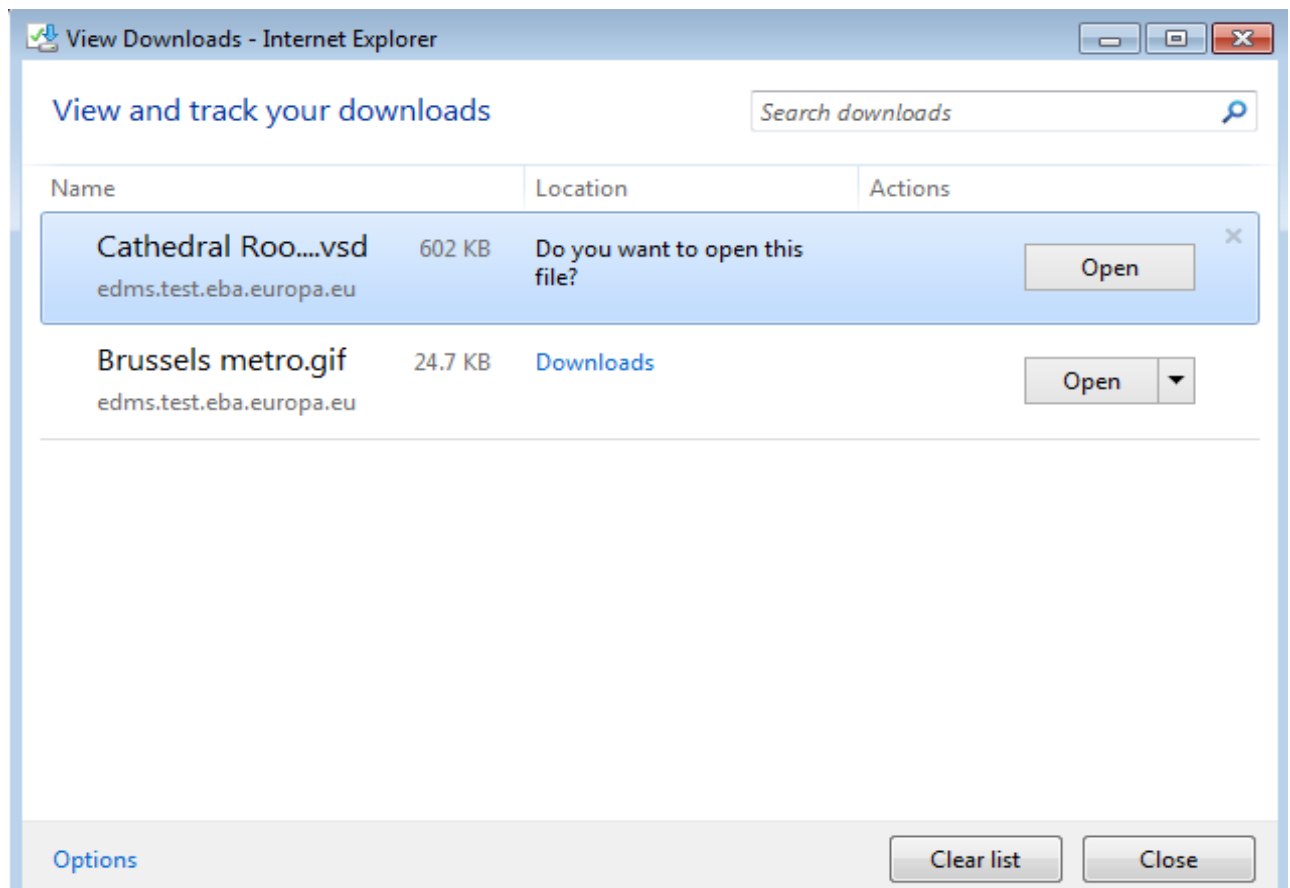


Figure 82: View downloads – Document dialog downloads folder

All documents that were previously opened by the user are stored in the local folder. Unopened ones will be pending with a following message:

“..Do you want to open this file?”

7. Click OPEN next to the document
8. Once the document has opened, click File on the main tool bar.

The user may view or edit the document (editing is dependent on access permissions for the user).

9. Click **Check Out** for editing
10. Upon completion, **check** the file back in

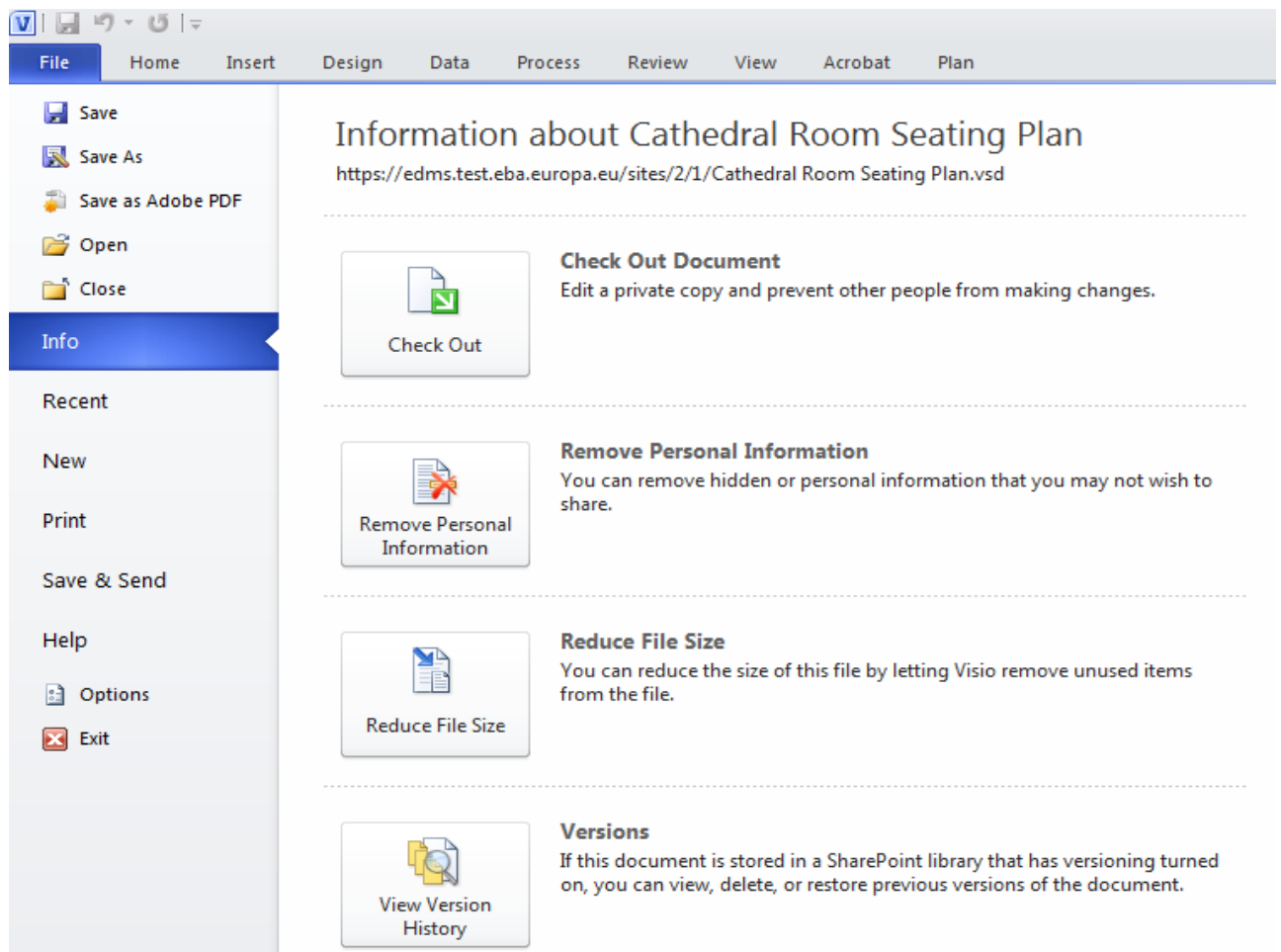


Figure 83: Document File – Check out file for editing

### 5.1.11 Follow

This document menu has exactly the same function as Followed Documents tab on the main user's dashboard (see 4.3.9)

### 5.1.12 Delete

When a document is uploaded to a Drop Off library and pending registration to EDEN system it can still be deleted.

Figure 84: Document Registration – Add Documents Drop Off library view

As previously (see point 4.3.3 Document Registration) the Drop Off library holds documents that have been uploaded but not yet registered to the system. At this stage the owner may decide to delete his records without going through the four (4) eye principle of Special and Super Users' involvement.

Follow the steps to delete the document from a Drop Off library:

1. Click on the **Document Registration** tab. All documents pending registration in Drop Off library will be listed.
2. Click on the three (3) dots next to document title to open the document menu
3. Right click on the dots and a small icon with data and document title (or preview of it will show if it is a PDF or Jpeg).
4. Click on three (3) dots next to EDIT to see document's menu.
5. From the document menu choose option DELETE.

Figure 85: Document Registration –Drop Off library document menu

6. The system will generate a warning message
7. Click OK to delete the document from *Drop Off library* of EDEN.

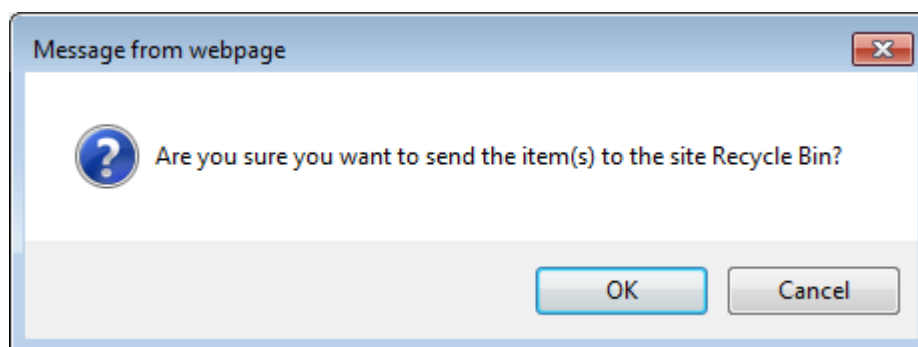


Figure 86: Document Registration –Drop Off library document menu

### 5.1.13 Document Version History

Every document that is maintained in EDEN may be going through versioning. Editing, checking out and checking in will each time change (upgrade) version of this document.

Version history stores all data available for the user to view and navigate through all changes made to the document as well as to see any possible links to other documents.

The following can be checked in **document properties** and version history:

- Metadata (mandatory and non-mandatory fields if applied)
- Document Owner
- Relation to other documents Yes/No
- Closure Date
- Marked for deletion (Special User → Super User)
- Creation Date
- Last modified date
- Permissions set Yes/No



**Attention** Documents marked for deletion have their properties available for viewing. Neither version history nor check -in/out- is available.

To see document version history navigate to Document Properties from document side action menu.

1. Click on **View Properties**
2. Choose **Version History** from the top properties panel

Figure 87: Document side bar menu – View properties

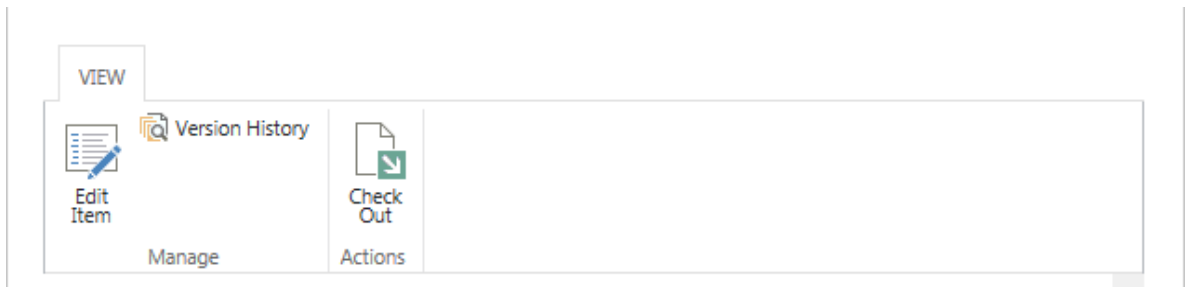


Figure 88: View Properties – Version History

In the VIEW Panel of Document Properties:

- Check in ( if checked out)
- Check out ( if checked in)
- Version History

The below is an example of a document version history












Figure 89: Version history – metadata and versioning

## 6. Navigation Icons explained

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EDEN Home button

	Word Document
	Visio Document
	Excel Documents
	Power Point Document
	PDF Document
	Jpeg Document
	Checked out Document
	Document marked for deletion – Step 1
	Browse for a valid choice
	Calendar (choose a date)
	Select all

# 7. Frequently Asked Questions

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Below is a list of some of the frequently asked questions answers thereto.

## 7.1 Q: Where do I draft documents before registering them in EDEN?

A: Documents in early drafting can be created on local, Unit, or Project level workspace – this is defined outside of this document.

## 7.2 Q: Where a document needs cross-unit collaboration, where do I work on it?

A: At the point at which a Document needs cross-unit or cross-project collaboration, then it can be registered in EDEN with a status of 'Draft', and providing permissions are managed appropriately, colleagues may 'Check-out' the document to make their changes and then 'Check-in' the document with their changes, making it available for other colleagues with appropriate permissions to work on.

## 7.3 Q: Who manages who can see/edit what document?

A: The Document Owner – i.e. the person who initiates or receives the document and registers it into the EDEN - has to manage the permissions i.e. dictates to EDEN who can Read / Edit the Document. The default permission in EDEN is that documents can be read by all EBA staff, so it's critical that documents are classified correctly and assigned with the appropriate permissions.

## 7.4 Q: How do I send documents for review from EDEN?

A: The EDEN is capable of providing a URL (Hyperlink) for any registered Document, which can be pasted into an e-mail. The recipient can then access the Document from that URL providing they've been granted appropriate permissions to that document. Note that this will only work from devices inside of the EBA's network – i.e. Blackberries or iPads are currently not able to access the document from the URL. Where there is doubt about the recipient's whereabouts it would be prudent to also send the document as an attachment.

## 7.5 Q: How do I know what kind of documents I can find in EDEN?

A: Every document will be registered in the EDEN with a series of meta-data fields, and each functional team that generates documents as part of their processes will have developed a specific guideline for that type of document, detailing what the meta-data values should be. From those a global guideline document has been developed detailing the meta-data values to search with when seeking a specific type of document. Of course, whether you can see the document in question depends on whether you've been granted read/edit rights by the Document Owner.

## 8. Appendix

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### 8.1 Document Definition

The EBA's Document Management Policy defines a "document" as any content drawn up or received by the EBA concerning a matter relating to the policies, activities and decisions falling within the EBA's competence and in the framework of its official tasks, in whatever medium (written on paper or stored in electronic form).

Documents:

- a) Are received or formally drawn up by the EBA in the course of its activities; and
- b) Are likely to require action, follow-up or a reply from the EBA or involve its responsibility; and
- c) Contain important information which is not short-lived.

Important and not short-lived are criteria subject to subtle judgement that will vary with the content and context of the document.

E-mails may be documents when they meet these tests.

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