Tips for working with **eDEN**

{ All electronic documents which fulfil the criteria for 'EBA document' should be registered (uploaded) in eDEN.

Definition of 'EBA Document' and guidance on registering documents may be found on the Intranet\In-House Services\Document Management page. }

DOCUMENT REGISTRATION

Document registration in eDEN is a 2-step process.

1. '**Add a Document**', upload your document and fill out metadata fields.

2. Click on '**Document Registration**' and grant permissions to the correct groups/units.

Done!

TOP TIP Grant permissions to Functional groups or Units, not just to individuals.

This will ensure that there is always someone that can read and edit your documents. Documents with permissions for individual staff members only may not be accessible in the future, if these staff members are no longer at the EBA.

The default setting for permissions is All EBA/read, but this is turned off in eDEN when documents are classified at the EBA Confidential Use and EBA Restricted Use levels.

TOP TIP Use the Standard Operating Procedures (SOPs) when registering documents.

A list of all SOPs may be found on the Intranet\In-House Services\Document Management page.

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HOW TO CREATE AND NAME EBA DOCUMENTS

- Filename should include document date YYYY-MM-DD (e.g. 2016-08-01) plus topic and any actions;

- If you use abbreviations refer to the abbreviations guide on the intranet;

- Inside your document include a **classification level** ('Unrestricted', 'EBA Restricted Use', and 'EBA Confidential Use') and a date;

- Include **status** ('Draft' or 'Final');

EXAMPLES:

Comments from Units in track changes, re: Consultation paper on Guidelines on Remuneration.

- 2016-08-17_CP on GL on Remuneration – Comments from Units – Draft

Document Management policy approved by the Management Board on 23 November 2015

- 2015-11-23_ Document Management Policy approved by Management Board – Final

TOP TIP **Use a naming convention in the 'Object' metadata field to group documents related to a task.**

You will need to group related documents together to have the whole 'story' of a project, task or event, and to be able to pass on this important information.

When registering documents related to the same task, enter exactly the same value in the **Object** field.
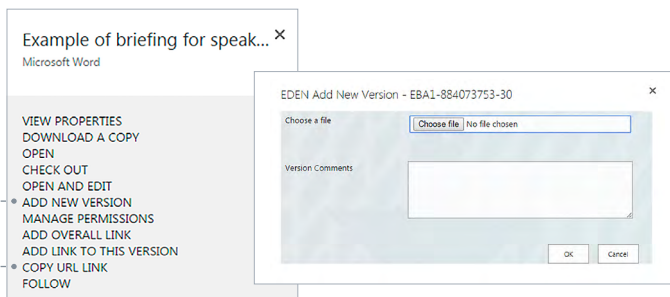
EXAMPLE:

'2016 CP on GL on Remuneration'

If you use the same metadata value in the **Object** field for related documents, you will be able to group these documents in a Search. See Search Tips for eDEN.

Add versions to an existing document instead of uploading multiple versions.

eDEN is designed to reduce the number of versions of documents. Once you've created a document in eDEN, add versions to that document instead of uploading a new document.

Example of briefing for speak... ×
Microsoft Word

VIEW PROPERTIES
DOWNLOAD A COPY
OPEN
CHECK OUT
OPEN AND EDIT
● ADD NEW VERSION
MANAGE PERMISSIONS
ADD OVERALL LINK
ADD LINK TO THIS VERSION
● COPY URL LINK
FOLLOW

EDEN Add New Version - EBA1-884073753-30 ×

Choose a file   Choose file   No file chosen

Version Comments

OK   Cancel

Send links to documents in eDEN rather than sending email attachments.

Send document links to colleagues ('copy URL link', then paste this link inside an email) instead of sending email attachments. Sending links keeps documents safe because only EBA staff members with the right permissions will be able to open eDEN links (emails can be forwarded).

DOCUMENT CLASSIFICATION VS. PERMISSIONS

| EU Restricted |
| EBA confidential use |
| EBA Restricted use |
| Unrestricted |

When you classify your document 'Unrestricted' (default), 'EBA Restricted Use', or 'EBA Confidential Use', you are providing information regarding its sensitivity, not limiting its distribution.

To specify who may read/edit your document you need to grant **permissions**. Regardless of your document's Classification level, permissions need to be granted to Functional groups/Units that need the information for the performance of their tasks.

The EBA may receive, but not create, 'EU Restricted' documents. Only the EC may create 'EU Restricted' documents. Refer to the Document Classification Policy.

SEARCH TIPS FOR eDEN

In the Search box, click on 'Show more options' to see the full range of searchable fields.

Use double quotation marks " " to enclose a search string to narrow your search – this will bring back text between the quotation marks.

EXAMPLE:

"2016 ITS on Supervisory Reporting" will find documents with the following Object values:

- 2016 ITS on Supervisory Reporting
- 2016 ITS on Supervisory Reporting – Legal Assessment
- 2016 ITS on Supervisory Reporting – Impact Assessment

If you enter: 2016 ITS on Supervisory Reporting without double quotation marks in the Object field, this will find any text that matches the search text in the Object field.

- 2016 ITS on Supervisory Reporting
- Draft Work Programme 2016

RESOURCES ON DOCUMENT MANAGEMENT

Intranet\In-House Services\Document Management

- Document Management Policy
- Document Classification Policy
- Guidance on Documents to be Registered
- Presentations
- Guides and Tips
- List of SOPs by Unit

QUESTIONS? Document Management Officer (DMO)
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