

# EDI Workflow System

## **Eco Data Entry User Manual**

[edifr.exchange-data.net](http://edifr.exchange-data.net)

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## OVERVIEW

A “Workflow” is the life cycle a file goes through in order to get “Published” to the AFED Live System.

The “Eco Data Entry” Workflow has been designed to help...

- Reduce the number of manual stages required to import the Economic Data into the database and publish it to the Live System.
- Reduce the number of manual labour hours it takes to go through the life cycle

And

- Apply some common validation and quality checks against the data to reduce the number of errors reaching the database.

This Workflow will replace the following “Manual” Workflows for the majority of files to be processed;

- AFED Standard
- AFED Standard with Translation

### Note:

- The “Manual” Workflows should still be used to complete any files that have already started the first stage of its current workflow life cycle or files that currently cannot be handled by the new Workflow.

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**Email Address:** dt1207@hotmail.com

**Telephone:** 0027 (0)82 7823 750

## PROJECT LEADER'S REQUIREMENT

Before any Source is worked on, the following steps must be completed:

- Contact the source for Excel files. Update the google drive with any progress.

**Agadir:**

<https://docs.google.com/spreadsheets/d/1HFxt92v0qtuvh3m6MB-R-0dWNzpl1BzB7A4eIEF4Ug0/edit#gid=0>

**London:**

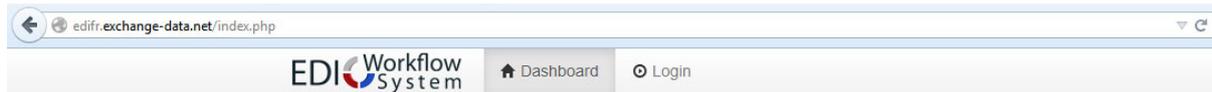
<https://docs.google.com/spreadsheets/d/1sTFp0xnTNg6b2Z3NasLw3DDXLvTDjdca7CzXDp7BreA/edit#gid=0>

- Compile a complete list of all links and datasets on the specific website. This should include ALL relevant data.
- Submit your completed list to the Project Leader for authorization to start working on that source.

## GETTING STARTED

Please click the following link or paste it into your browser of preference:

<http://edifr.exchange-data.net>



Select **“Login”** from the top navigation bar and enter your login credentials

Once logged in, you will be brought to your dashboard which consists of four sections:

- [User Information](#)
- [Files In Progress](#)
- [Files Pending Publishing](#)
- [Unassigned Files](#)

**Note:**

- If you have not been provided with your login credentials, please speak to your line manager or supervisor about gaining access to the system.

# DASHBOARD

## Notes:

- Clicking the  icon opens up the content in a new window/tab.
- To access the Dashboard from anywhere in the system, click the “Dashboard” button in the top navigation bar.

**EDI Workflow System**
Dashboard
File System
Sourcing
Organisation
User (Youness)
Help

Home / File Management

### Files In Progress

| File ID | File Name                    | Workflow      | Status    | Language | Source                       | User     | Start Time  |
|---------|------------------------------|---------------|-----------|----------|------------------------------|----------|---|
| 5946    | Bilateral Trade by Sector... | AFED Standard | Formatted | English  | African Growth and Opport... | Callum   |  |
| 5948    | Bilateral Trade by Sector... | AFED Standard | Formatted | English  | African Growth and Opport... | Callum   |  |
| 5949    | Bilateral Trade by Sector... | AFED Standard | Formatted | English  | African Growth and Opport... | Callum   |  |
| 5991    | Bilateral Trade by Sector... | AFED Standard | Formatted | English  | African Growth and Opport... | Callum   |  |
| 6608    | World Drug Report 2011ebo... | AFED Standard | Formatted | English  | United Nations Office on ... | Callum   |  |
| 6896    | WUP2011 - F17b City Size ... | AFED Standard | Formatted | English  | UN Population Division       | Callum   |  |
| 7132    | CityPopulation               | AFED Standard | Formatted | English  | CityPopulation               | Callum   |  |
| 8294    | Food Balance Sheet in SAD... | AFED Standard | Formatted | English  | South African Development... | Mustapha |  |
| 9123    | Merchandise trade matrix ... | AFED Standard | Formatted | English  | United Nations Conference... | Callum   |  |
| 9204    | Export goods & of service... | AFED Standard | Formatted | English  | United Nations Conference... | Callum   |  |

← 1 2 3 4 5 6 7 8 9 10 →

USER INFORMATION

**Username:** Youness

**AFED ID:** 3

**Department:** Administrators

**Level:** Administrator

### Pending Authorization

| File ID | File Name                    | Status  | Uploaded By  | # Tables | Submit Date | Comments   |
|---------|------------------------------|---------|--------------|----------|-------------|--|
| 14520   | Population                   | Pending | Abdeighafour | 13       | 2014-10-28  | No  |
| 14521   | Environment fertilizers      | Pending | Elhoucine    | 4        | 2014-10-28  | No  |
| 14479   | Summary Main Macro-Econom... | Pending | Marilia      | 3        | 2014-10-28  | No  |
| 11960   | Domestic Debt (Annual) 1...  | Pending | Felipe       | 1        | 2014-10-29  | No  |
| 14524   | Treasury Bills - Up to Ap... | Pending | Jose Luis    | 2        | 2014-10-29  | No  |
| 14519   | Emissions Agriculture Tot... | Pending | Baddouh      | 12       | 2014-10-29  | No  |
| 14525   | Production and use of ene... | Pending | Elhoucine    | 2        | 2014-10-29  | No  |
| 11090   | Treasury Bonds Up to Marc... | Pending | Jose Luis    | 6        | 2014-10-29  | No  |
| 14527   | Water use in agriculture     | Pending | Elhoucine    | 1        | 2014-10-29  | No  |
| 14532   | Pesticides use               | Pending | Elhoucine    | 1        | 2014-10-29  | No  |

← 1 2 →

### Unassigned Files

| File ID | File Name                    | Workflow                       | Status  | Source                | Language | Upload Time         | Uploaded By   |
|---------|------------------------------|--------------------------------|---------|-----------------------|----------|---------------------|---|
| 2       | Annual Report 2002           | AFED Standard                  | Checked | Central Bank of Sudan | English  | 2013-05-16 14:29:51 | Shaun  |
| 3       | Annual Report 2003           | Eco Data Entry                 | New     | Central Bank of Sudan | English  | 2013-05-16 14:29:59 | Shaun  |
| 4       | Annual Report 2004           | AFED Standard                  | Checked | Central Bank of Sudan | English  | 2013-05-16 14:30:06 | Shaun  |
| 5       | Annual Report 2005           | AFED Standard                  | New     | Central Bank of Sudan | English  | 2013-05-16 14:30:24 | Shaun  |
| 7       | Annual Report 2007           | AFED Standard                  | New     | Central Bank of Sudan | English  | 2013-05-16 14:33:50 | Shaun  |
| 8       | Annual Report 2009           | AFED Standard                  | New     | Central Bank of Sudan | English  | 2013-05-16 14:49:49 | Shaun  |
| 10      | Economics and Statistics ... | AFED Standard with Translation | New     | Central Bank of Sudan | Arabic   | 2013-05-16 14:55:14 | Shaun  |
| 11      | Economics and Statistics ... | AFED Standard with Translation | New     | Central Bank of Sudan | Arabic   | 2013-05-16 14:55:57 | Shaun  |
| 12      | Economics and Statistics ... | AFED Standard with Translation | New     | Central Bank of Sudan | Arabic   | 2013-05-16 14:57:00 | Shaun  |
| 13      | Economics and Statistics ... | AFED Standard with Translation | New     | Central Bank of Sudan | Arabic   | 2013-05-16 14:57:43 | Shaun  |

← 1 2 3 4 5 6 7 8 9 10 →

## User Information

Your “User Information” is displayed to you throughout the system for purposes of support when resolving usage issues within the system.

The following information is displayed:

- Your Username
- Your AFED ID
- Your Department
- Your Level
- Your Supervisor



## Files in Progress

This section displays a list of Original Files, for All Workflows, with their Stages, that are actively being worked on by you.

### Files In Progress

| File ID | File Name                    | Workflow      | Status    | Language | Source                       | User     | Start Time |
|---------|------------------------------|---------------|-----------|----------|------------------------------|----------|------------|
| 5946    | Bilateral Trade by Sector... | AFED Standard | Formatted | English  | African Growth and Opport... | Callum   |            |
| 5948    | Bilateral Trade by Sector... | AFED Standard | Formatted | English  | African Growth and Opport... | Callum   |            |
| 5949    | Bilateral Trade by Sector... | AFED Standard | Formatted | English  | African Growth and Opport... | Callum   |            |
| 5991    | Bilateral Trade by Sector... | AFED Standard | Formatted | English  | African Growth and Opport... | Callum   |            |
| 6608    | World Drug Report 2011ebo... | AFED Standard | Formatted | English  | United Nations Office on ... | Callum   |            |
| 6896    | WUP2011 - F17b City Size ... | AFED Standard | Formatted | English  | UN Population Division       | Callum   |            |
| 7132    | CityPopulation               | AFED Standard | Formatted | English  | CityPopulation               | Callum   |            |
| 8294    | Food Balance Sheet in SAD... | AFED Standard | Formatted | English  | South African Development... | Mustapha |            |
| 9123    | Merchandise trade matrix ... | AFED Standard | Formatted | English  | United Nations Conference... | Callum   |            |
| 9204    | Export goods & of service... | AFED Standard | Formatted | English  | United Nations Conference... | Callum   |            |

|   |   |   |   |   |   |   |   |   |   |    |   |
|---|---|---|---|---|---|---|---|---|---|----|---|
| ← | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | → |
|---|---|---|---|---|---|---|---|---|---|----|---|

Incomplete “Eco Data Entry” workflow sessions will automatically be saved here and can be completed at a later stage by clicking the icon. Please see [“Continuing a Data Entry Session”](#) for further details

### Statuses:

New = A file that hasn’t completed the first stage of its life cycle

Incomplete = An Original File that you have started but have yet to finish

Formatting = A file you are currently Formatting

Coding = A file you are currently Coding

Rejected = An Original File entry that has been Rejected by the Supervisor due to errors

### Note:

If you see a status of “Rejected”, this is due to errors found in your submission. Please see [“Rejected Files”](#) for further details

### Supervisors Note:

- This list will show you the Original Files that are actively being worked on by ALL Users for your Office

## Files Pending Publishing

This section displays a list of Original Files that have been submitted for Publishing through the “Eco Data Entry” Workflow.

### Pending Authorization

| File ID | File Name                    | Status  | Uploaded By  | # Tables | Submit Date | Comments |   |
|---------|------------------------------|---------|--------------|----------|-------------|----------|---|
| 14520   | Population                   | Pending | Abdelghafour | 13       | 2014-10-28  | No       |  |
| 14521   | Environment fertilizers      | Pending | Elhoucine    | 4        | 2014-10-28  | No       |  |
| 14479   | Summary Main Macro-Econom... | Pending | Marilia      | 3        | 2014-10-28  | No       |  |
| 11960   | Domestic Debt (Annual) 1...  | Pending | Felipe       | 1        | 2014-10-29  | No       |  |
| 14524   | Treasury Bills - Up to Ap... | Pending | Jose Luis    | 2        | 2014-10-29  | No       |  |
| 14519   | Emissions Agriculture Tot... | Pending | Baddouh      | 12       | 2014-10-29  | No       |  |
| 14525   | Production and use of ene... | Pending | Elhoucine    | 2        | 2014-10-29  | No       |  |
| 11090   | Treasury Bonds Up to Marc... | Pending | Jose Luis    | 6        | 2014-10-29  | No       |  |
| 14527   | Water use in agriculture     | Pending | Elhoucine    | 1        | 2014-10-29  | No       |  |
| 14532   | Pesticides use               | Pending | Elhoucine    | 1        | 2014-10-29  | No       |  |



You can page through the records using the arrows and page numbers at the bottom left of the table.

### Statuses:

**Pending** = An Original File that is awaiting publishing

**Corrected** = An Original File that has been corrected by the User and is awaiting publishing

### Note:

- If you can no longer see your file in this list, this means the file has been “Published” to the Live System. Please see “[Published Files](#)” for further details.

### Supervisors Note:

- This list will show you all Original Files pending publishing for your Office.
- You can “Publish” a file by clicking the  icon. Please see “[Publishing a File](#)” for further details

## Unassigned Files

This section displays a list of original files that have yet to be worked on. Every time a new file is created, it goes into this list.

### Unassigned Files

| File ID | File Name                    | Workflow                       | Status  | Source                | Language | Upload Time         | Uploaded By |  |
|---------|------------------------------|--------------------------------|---------|-----------------------|----------|---------------------|-------------|--|
| 2       | Annual Report 2002           | AFED Standard                  | Checked | Central Bank of Sudan | English  | 2013-05-16 14:29:51 | Shaun       |  |
| 3       | Annual Report 2003           | Eco Data Entry                 | New     | Central Bank of Sudan | English  | 2013-05-16 14:29:59 | Shaun       |  |
| 4       | Annual Report 2004           | AFED Standard                  | Checked | Central Bank of Sudan | English  | 2013-05-16 14:30:06 | Shaun       |  |
| 5       | Annual Report 2005           | AFED Standard                  | New     | Central Bank of Sudan | English  | 2013-05-16 14:30:24 | Shaun       |  |
| 7       | Annual Report 2007           | AFED Standard                  | New     | Central Bank of Sudan | English  | 2013-05-16 14:33:50 | Shaun       |  |
| 8       | Annual Report 2009           | AFED Standard                  | New     | Central Bank of Sudan | English  | 2013-05-16 14:49:49 | Shaun       |  |
| 10      | Economics and Statistics ... | AFED Standard with Translation | New     | Central Bank of Sudan | Arabic   | 2013-05-16 14:55:14 | Shaun       |  |
| 11      | Economics and Statistics ... | AFED Standard with Translation | New     | Central Bank of Sudan | Arabic   | 2013-05-16 14:55:57 | Shaun       |  |
| 12      | Economics and Statistics ... | AFED Standard with Translation | New     | Central Bank of Sudan | Arabic   | 2013-05-16 14:57:00 | Shaun       |  |
| 13      | Economics and Statistics ... | AFED Standard with Translation | New     | Central Bank of Sudan | Arabic   | 2013-05-16 14:57:43 | Shaun       |  |



To claim an unassigned file and start working on it, click the icon and you will be taken to the Original File Profile where you will be able to download the original file and begin work. Please see [“File Management”](#) for further details

### Notes:

- You **MUST** “Lock” the Original File when you start working on it. Unlocking will occur automatically when you complete the stage. Please see [“Locking an Original File”](#) for further details

### Supervisors Note:

- You will be able to assign “Original Files” to Users by clicking the icon and using the options that appear on the “Original File’s Page”.

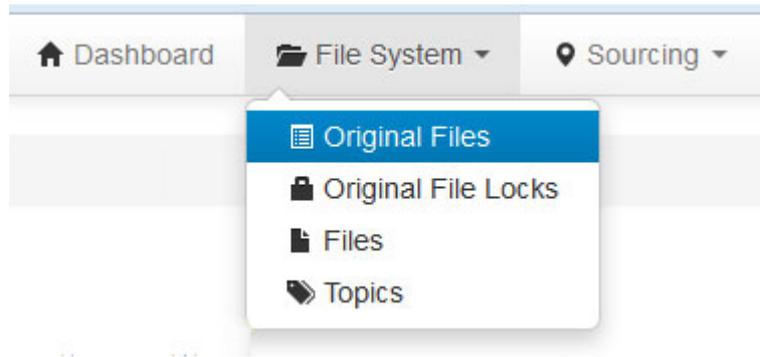
## FILE MANAGEMENT

“File Management” is where you manage all aspects of the Original Files life cycle

- [Creating an Original File](#)
- [Updating the Metadata for an Original File](#)
- [Deleting an Original File from the System](#)
- [Downloading an Original File](#)
- [Locking/Unlocking an Original File](#)
- [Beginning a Workflow Session](#)
- [Starting a Data Entry Session](#)
- [Continuing a Data Entry Session](#)
- [Publishing a File](#)
- [Published Files](#)
- [Rejected Files](#)

## Creating an Original File

Go to “File Management” in the top navigation bar and select “Original Files” from the drop-down menu



A list of all existing “Original Files” will be presented to you in a table. Use filters to check the file hasn’t already been added to the system.

## Original Files

Displaying 1-10 of 12640 results.

| <input type="checkbox"/>            | <a href="#">Id</a> | <a href="#">Display Name</a> | <a href="#">Source</a> | <a href="#">Country</a> | <a href="#">Language</a> | <a href="#">Locked</a> | <a href="#">Stage</a> | <a href="#">Topics</a> |  |
|-------------------------------------|--------------------|------------------------------|------------------------|-------------------------|--------------------------|------------------------|-----------------------|------------------------|--|
| <input type="checkbox"/>            |                    |                              |                        |                         |                          |                        |                       |                        |  |
| <input checked="" type="checkbox"/> | 2                  | Annual Report 2002           | Central Bank of Sudan  | Sudan                   | English                  | No                     | Checked               | AFED, MONEY & BANKING  |  |
| <input checked="" type="checkbox"/> | 3                  | Annual Report 2003           | Central Bank of Sudan  | Sudan                   | English                  | No                     | In Progress           | AFED, MONEY & BANKING  |  |
| <input checked="" type="checkbox"/> | 4                  | Annual Report 2004           | Central Bank of Sudan  | Sudan                   | English                  | No                     | Checked               | AFED, MONEY & BANKING  |  |
| <input checked="" type="checkbox"/> | 5                  | Annual Report 2005           | Central Bank of Sudan  | Sudan                   | English                  | No                     | New                   | AFED, MONEY & BANKING  |  |
| <input checked="" type="checkbox"/> | 7                  | Annual Report 2007           | Central Bank of Sudan  | Sudan                   | English                  | No                     | New                   | AFED, MONEY & BANKING  |  |
| <input checked="" type="checkbox"/> | 8                  | Annual Report 2009           | Central Bank of Sudan  | Sudan                   | English                  | No                     | New                   | AFED, MONEY & BANKING  |  |
| <input checked="" type="checkbox"/> | 9                  | Economic Brief               | Central Bank of Sudan  | Sudan                   | Arabic                   | Yes                    | New                   | AFED                   |  |

Using the right hand "Action" links below your "User Information".

ACTIONS

- + New
- ✖ Delete
- ⬇ Download
- 🔒 Lock
- 🔓 Unlock

Click "New" to open the "Create Original File" form

Fields with \* are required.

Please fix the following input errors:

- Source Url is not a valid URL.
- The file "TestFile.pdf" is too small. Its size cannot be smaller than 2 bytes.

Display Name \*

Test File

Source

Central Bank

Algeria

Bank of Algeria

Uploaded File

Browse...

TestFile.pdf

The file "TestFile.pdf" is too small. Its size cannot be smaller than 2 bytes.

Source Url

www.bank-of-algeria.dz

Source Url is not a valid URL.

Notes

Source URL should start "http:\\"

Departments \*

AFED

Workflows\*

Eco Data Entry

Language \*

French

Create

- Enter/Select the Original File...
  - Display Name
  - Source
  - Source URL (if applicable)
  - Any Notes you may have
- Assign the “Workflow” that should be used to process the File (in this case, “Eco Data Entry”)
- Set the Language of the File
- Attach the File to be added into the system using the “Browse” button or dragging and dropping the file onto the “Browse” button
- Click the “Create” button once you have entered all the required criteria

**Note:**

- Any field that has been incorrectly entered will be highlighted in red and must be corrected before the form will allow you to move on

Upon completion, you will be taken to the “Original File’s Page” where you will be able to manage the file.

Please see “[File Management](#)” for further details on...

- [Updating the metadata for the Original File](#)
- [Deleting an Original File from the System](#)
- [Downloading an Original File](#)
- [Locking/Unlocking an Original File](#)
- [Beginning a Workflow Session](#)
- [Unpublishing Original File Data from the Live System](#)

## Updating the Metadata for an Original File

What is “Metadata”?

The Metadata for the Original File is the information or “Profile” provided when [creating an Original File](#).

Navigate to **File Management > Original Files >**

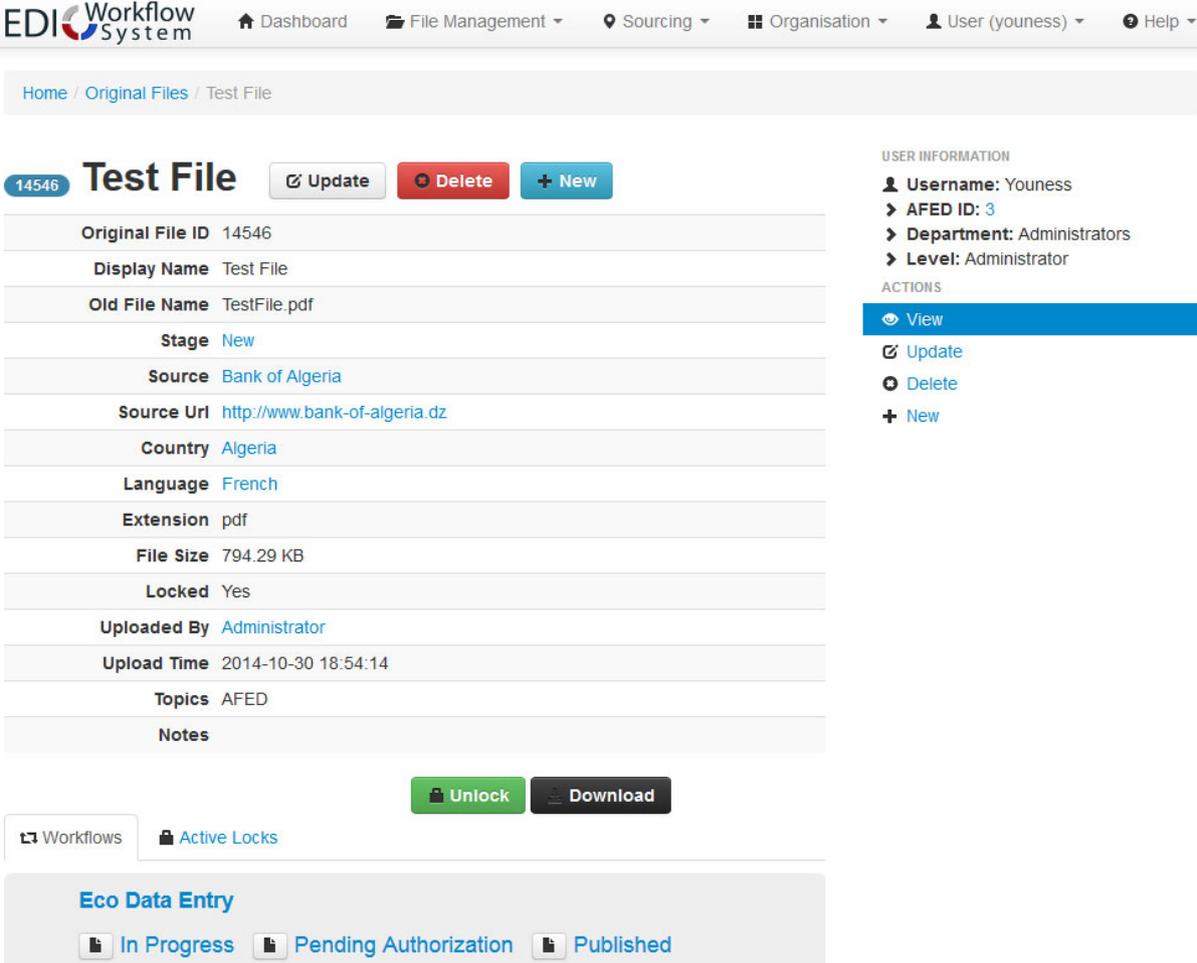
Find the Original File you would like to update using the filter boxes on the table or the search button.

## Original Files

Displaying 1-1 of 1 result.

| <input checked="" type="checkbox"/> | <b>Id</b>            | <b>Display Name</b>                    | <b>Source</b>        | <b>Workflow</b>      | <b>Country</b>       | <b>Language</b>      | <b>Locked</b>        | <b>Stage</b>         | <b>Topics</b>        |
|-------------------------------------|----------------------|--|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="checkbox"/>            | <input type="text"/> | <input type="text" value="Test File"/> | <input type="text"/> |
| <input checked="" type="checkbox"/> | 14546                | Test File                              | Bank of Algeria      | Eco Data Entry       | Algeria              | French               | Yes                  | New                  | AFED                 |

Once you have found your file, click the  icon to open the Original File Profile and click the grey “Update” button.



EDI Workflow System

Dashboard File Management Sourcing Organisation User (youness) Help

Home / Original Files / Test File

14546 **Test File** Update Delete + New

|                  |   |
|------------------|---|
| Original File ID | 14546   |
| Display Name     | Test File   |
| Old File Name    | TestFile.pdf  |
| Stage            | New   |
| Source           | Bank of Algeria   |
| Source Url       | <a href="http://www.bank-of-algeria.dz">http://www.bank-of-algeria.dz</a> |
| Country          | Algeria   |
| Language         | French  |
| Extension        | pdf   |
| File Size        | 794.29 KB   |
| Locked           | Yes   |
| Uploaded By      | Administrator   |
| Upload Time      | 2014-10-30 18:54:14   |
| Topics           | AFED  |
| Notes            |   |

USER INFORMATION

Username: Youness  
AFED ID: 3  
Department: Administrators  
Level: Administrator

ACTIONS

View Update Delete + New

Unlock Download

Workflows Active Locks

Eco Data Entry

In Progress Pending Authorization Published

You will be presented with a form pre-populated with the current Metadata.

Make the necessary changes and click the “Save” button

**Note:**

- When using the table filter boxes, you can enter more than one search criteria. Hit Enter on your keyboard to apply the filter

## Deleting an Original File from the System

Go to **File Management > Original Files >** and find the Original File you would like to Delete using the filter boxes on the table.

Once you have found your file, click the  icon to open the Original File Profile and click the red “Delete File” button.

### Note:

## Downloading an Original File

Go to **File Management > Original Files >** and find the Original File you would like to Download using the filter boxes on the table.

Once you have found your file, click the  icon to open the Original File Profile and click the black “download” button.

### Note:

- If you download the file and decide to work on it, please ensure you have “Locked” the file to indicate that you are working on it. Please see “Locking/Unlocking an Original File” for further details.

## Locking/Unlocking an Original File

Go to **File Management > Original Files >** and find the Original File you would like to Lock/Unlock using the filter boxes on the table.

Once you have found your file, click the  icon to open the Original File Profile and click the orange “Lock” button.

### Note:

- All Original Files that are actively being worked on by a User must be “Locked” for the system to properly display its processing lists.

## Beginning a Workflow Session

Go to **File Management > Original Files >** and find the Original File you would like to start working on using the filter boxes on the table.

Once you have found your file, click the  icon to open the Original File Profile.

At the bottom of the page you will find the “Workflow” box populated with the workflow name and stages with their progress.

Click on the stage you would like to begin and you will be taken to the functionality for your chosen workflow stage.

## Available Workflows

- AFED Standard
- AFED Standard with Translation
- Credit Ratings
- Interest Rates
- Eco Data Entry – See [“Starting a Data Entry Session”](#) for further details

### Note:

- All Original Files that are actively being worked on by a User must be “Locked” for the system to properly display its processing lists.

## Starting a Data Entry Session

Go to **File Management > Original Files >** and find the Original File you would like to start working on using the filter boxes on the table.

Once you have found your file, click the  icon to open the Original File Profile.

At the bottom of the page you will find the “Workflow” box populated with the workflow name and stages with their progress.

### Note:

- This should be set to the “Eco Data Entry” Workflow with “In Progress”, Pending Authorisation” and “Published” stages greyed out.
- If the Workflow is not assigned or the file is assigned to another Workflow, please see [“Updating the Metadata for an Original File”](#) for details on how to change the Workflow for your file.

Download the Original File using the black “Download” button.

Lock the Original File in the system using the orange [“Lock”](#) button.

Click on the “In Progress” icon and you will be taken to the [Data Entry Screen](#).

### Note:

- A Data Entry Session will be started once you have set the first “Header”

## **Data Entry Screen**

### **Setting a Table Header**

### **Assigning the Table Row Criteria**

### **Entering the Data**

- A Data Entry Session will be started once you have set the first “Header”

## Continuing a Data Entry Session

## Publishing a File

## Published Files

Go to File Management > Original Files > and type “Published” into the “Stage” filter and hit Enter on your keyboard. This will filter down the files to show you only the files that have been published.

Click the  icon for the file you wish to view and scroll down to the “Workflows” box.

Click the “Green Check Box” for the “Published” stage.

The data for this file will be displayed to you in tables.

## Rejected Files

## **FINAL VERY IMPORTANT NOTE**

If a source has been covered completely and all data on the source has been published by one of the offices, that office should immediately inform the Project Leader ([dt1207@hotmail.com](mailto:dt1207@hotmail.com)) about the completed source.

Front checking should then be done immediately by the specific office – see manual for front-end auditing.