ezShare implementation at Inter-American Development Bank Group
Document and Records Management platform

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IDBG partners with Latin America and the Caribbean countries to improve lives by reducing poverty and inequality

- Established in 1959 – First Regional Development Bank
- 48 Member Countries of which 26 are borrowers
- Provide loans, grants, technical assistance and research
- Annual Lending $14 B
**IDB is a knowledge driven organization**

**Decisions** are being made every day, on the basis of **information**, which must be **accurate** and produced **quickly** otherwise…

- **Efficiency** will decrease,
- **Level of Risks** will increase
- **Competitiveness** will drop
ezShare the new Document Management Platform

- Work from any location
- Share content
- Collaboration tools (Co-authoring)
- Access from any device
- More storage space
- Work online or desktop apps.

EASIER!
ezShare & RecordPoint

**ezShare** – O365
Document Management functionalities
What users see

**RecordPoint**
Records Management functionalities
In the background
RecordPoint is a rules engine system implemented at the IDB for the classification and the disposition process of Bank’s electronic and physical records.
ezShare Governance

- Why the ezShare Governance is required?
  - ezShare is based on MS SharePoint Online Platform
  - Microsoft indicates a SharePoint Governance is crucial for a successful implementation of the platform [https://technet.microsoft.com/en-us/library/cc263356(v=office.15)], [https://technet.microsoft.com/en-us/library/cc263356(v=office.14)]

- What is SharePoint Governance?
  "The SharePoint Governance Plan is a guidebook outlining the administration, maintenance, and support of X Corporation’s SharePoint environments. It identifies lines of ownership for both business and technical teams, defining who is responsible for what areas of the system. Furthermore it establishes rules for appropriate usage of the SharePoint environments" [http://en.share-gate.com/blog/real-world-sharepoint-governance-plan]
ezShare Governance

• Record Management team designs with Business Representatives a SharePoint Information Architecture per Organizational Unit

• Information Architecture includes:
  – Sites, libraries and folders structure and description
  – Per container:
    • Security
    • Content-type
    • Default values for our rules to work (Series)

• Information Architecture is approved by Management
Information in Office 365

- E-mails
- Documents (Word, Excel, PowerPoint, One Note, PDF)
- Pictures
- Contacts
- Calendar
- Videos
- Visio Files
- Skype Meeting Notes
- Conversations
- Surveys
- Blogs
- Wiki
- Etc. ...
ezShare VS OneDrive

OneDrive is a tool for storage of non-business information. Documents stored in OneDrive will be kept for one month after the employment contract termination as the space is directly related to the IDB email account.

By saving your information in ezShare you will be in compliance with IDB policies, that establishes that all information related to work activities created by Bank personnel is an IDB Group record.
Progressive ezShare-RP Implementation

Information Architecture Design
- Prepare Proposal
- Review
- Testing
- Approval

Migration from IDBDocs
- Classification
- Mapping
- Quality Assurance
- Finalization

Training
- Face to Face
- One-to-One for Management
- Advanced for Power Users

Post-Implementation Support
- Floor-walking
- On Demand Support

Confidential
Records Management Section
Approach for migration from previous EDRMS

- Progressive migration (Copy not Move)
- Encourage cleaning exercise
- Business heavily involved in migration exercise
- Migration mapping approved prior to the execution of the migration
- Automated when information is classified
- Ad-hoc solutions when required
Different ways to be trained

- How To Quick Sheets.
- How To Videos.
- Self-paced Trainings.
- F2F Trainings / Webinars.
- Ad-hoc demos and training sessions.
- Floor-Walk Support after go live.

Dedicated ezShareinfo site!
Regular monitoring based on Key Indicators

- Provide factual information on ezShare usage at Unit level
- Identify strengths and weaknesses in terms of document and records management
- Provide recommendations to key stakeholders for improvement.
- Evaluate progress on regular basis
Go for it!

- Maturity of the cloud market
- Dependency with external vendors
- Governance
- Security?

- You cannot escape Cloud solutions and Office365
- Simplifies IT processes
- Reduces delivery times for users and increases functional capabilities