

# Build to Share - eDocs

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## Overview...



An Roinn Caiteachais  
Phoiblí agus Athchóirithe  
Department of Public  
Expenditure and Reform



# What is Build to Share?

- Public Service ICT Strategy
  - BTS is one of the key pillars
- Build Once – Use Many Times
  - Focus on common business requirements across Departments
  - Not Line of Business Applications
  - Digitisation of general corporate processes – inconsistent at present
  - Corporate processes alignment – improve mobility
  - Reduce build cost by sharing
  - Free Line Depts. to tackle LOB challenges



# Service Delivery - Overview

- Applications developed and maintained centrally
- Infrastructure built and maintained centrally
- Governance
  - Application specific working groups
  - Programme Working group
- Departments isolated where appropriate:
  - <https://justice.cloud.gov.ie/app/eSubmissions>
  - <https://agriculture.cloud.gov.ie/apps/ePQ>
  - <https://per.cloud.gov.ie/>
- Departments shared where appropriate:
  - <https://hive.cloud.gov.ie/>

# Application Tenant

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SharePoint Tenant hosted on  
Government Cloud

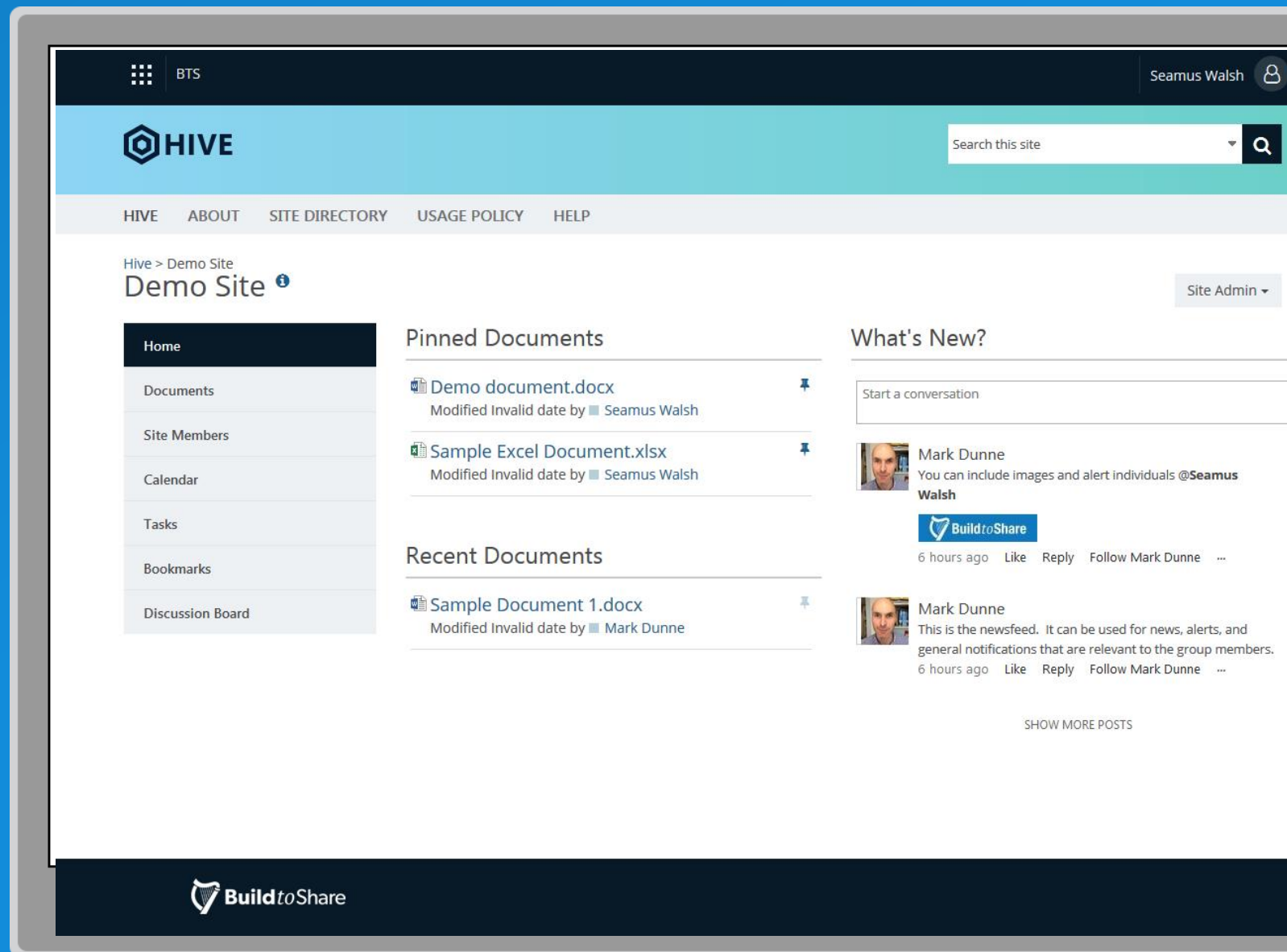
- One Department = One Tenant
- Platform level **isolation**
- **Intranet** Solution available
- Single Sign-On
- Access to suite of Applications



# Shared Tenant – The Hive

Shared tenant accessible to on  
boarded bodies

- Utilize team sites to **collaborate**
- Secure **Document Sharing**
- **Easy** to administer
- **Temporary** data store
- Inactive sites deleted after 12 months





## Technical Onboarding - Progress to Date

	Current Status
On-boarding	<b>Live:</b> PER, FIN, Justice, Health, Education, Agriculture, Taoiseach, DFA, Prison Service, Housing, Jobs, Arts, Transport, Defence, DCYA, Communications, DCYA, OPW, DEASP, CSO, Attorney General, Tusla

# Application Rollout - Status



	Current Status	End 2018
eSubmissions	Live/Planned - PER, FIN, Justice, Education, Housing, DFA, Agriculture, Jobs, CHG, DRCD, Health, DCYA, Defence, Transport, DEASP	All – Ministerial Departments
ePQ	Live/Planned - PER, FIN, Education, Agriculture, Jobs, Housing, Justice, Transport, CHG, DRCD, DCYA, Health, Defence, OPW, Tusla, DEASP	All – Ministerial Departments
eCorrespondence	Live/Planned – Taoiseach, Housing, Education, DRCD, PER, Finance, Transport, CHG	Live 8 Departments
eFOI	Live/Planned – Justice, Finance, CHG, PER, DRCD	Live 8 Departments
eDocs	Live - PER, FIN, Housing, NSSO, OGP Planned – DRCD, Agriculture, Justice	Live 4 Departments Rollout Started – 2 Departments

# Introducing eDocs



## eDocs Training - DPER - March 2017

Preparation of training materials for training of eDocs delivery

DEV009: eDocs Training > DEV009-002-2017

All Documents

Emails Only

✓	Name	Document Topics	Modified By	Modified	Created	Declared Record
	Background Research	...	Claire Atcheson	21 March	21 March	
	Lesson Plans	...	Claire Atcheson	21 March	21 March	
	Schedule	...	Claire Atcheson	21 March	21 March	
	Temporary Documents	...	System Account	21 March	21 March	
	Doors	...	Claire Atcheson	21 March	21 March	
	Test Email for Attaching ✖	...	Mark Dunne	A few seconds ago	A few seconds ago	
	Test Excel Document for Attaching ✖	...	Mark Dunne	A few seconds ago	A few seconds ago	
	Test Image for Attaching ✖	...	Mark Dunne	A few seconds ago	A few seconds ago	
	Test PDF Document for Attaching ✖	...	Mark Dunne	A few seconds ago	A few seconds ago	
	Test PowerPoint for Attaching ✖	...	Mark Dunne	A few seconds ago	A few seconds ago	
	Test Publisher for Attaching ✖	...	Mark Dunne	A few seconds ago	A few seconds ago	

File Reference:	DEV009-002-2017
Contact:	Claire Atcheson
Topics:	Education; Local Government; ICT Training; FOI Training; Language Training
Opened On:	21/03/2017
Review Date:	
Last Updated:	16/06/2017
Security Classification:	Unclassified
Comments:	

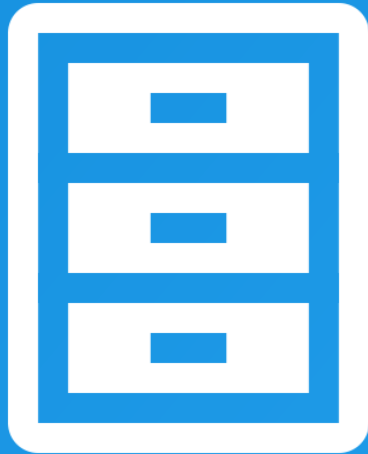
Shared With

... More





# The Paper World



# The Paperless World



# **Problems we now face**

**Difficulty in meeting legislative obligations**

**We don't file...we save...randomly!**

**Wasted time spent searching**

**Lost information**

**Staff work to their individual needs and not the organisational needs**

**Versions – who holds the master?**

# Legislative Obligations

*“All records made or received, and held in the course of its business, by the  
Department regardless of their format,  
must be preserved”*

**National Archives Act (1986)**

# Legislative Obligations

*“...allow access by the general public to data held by national governments...”*

*“...good records management practice and the obligations of public authorities under the Public Records Acts to maintain their records in an ordered and managed way, so that they can readily retrieve information when it is needed.”*

Freedom of Information Act (2014)

# Legislative Obligations

*“...you have a right to be informed as to how your personal data is being processed (handled or used) by an organisation.”*

*“...you have a right to obtain a copy, of any information relating to you kept on computer or in a structured manual filing system or intended for such a system by any organisation”*

**General Data Protection Regulations (2018)**

# **Benefits to the Organisation?**

**Adherence to legislative responsibilities**

**Filing...not saving**

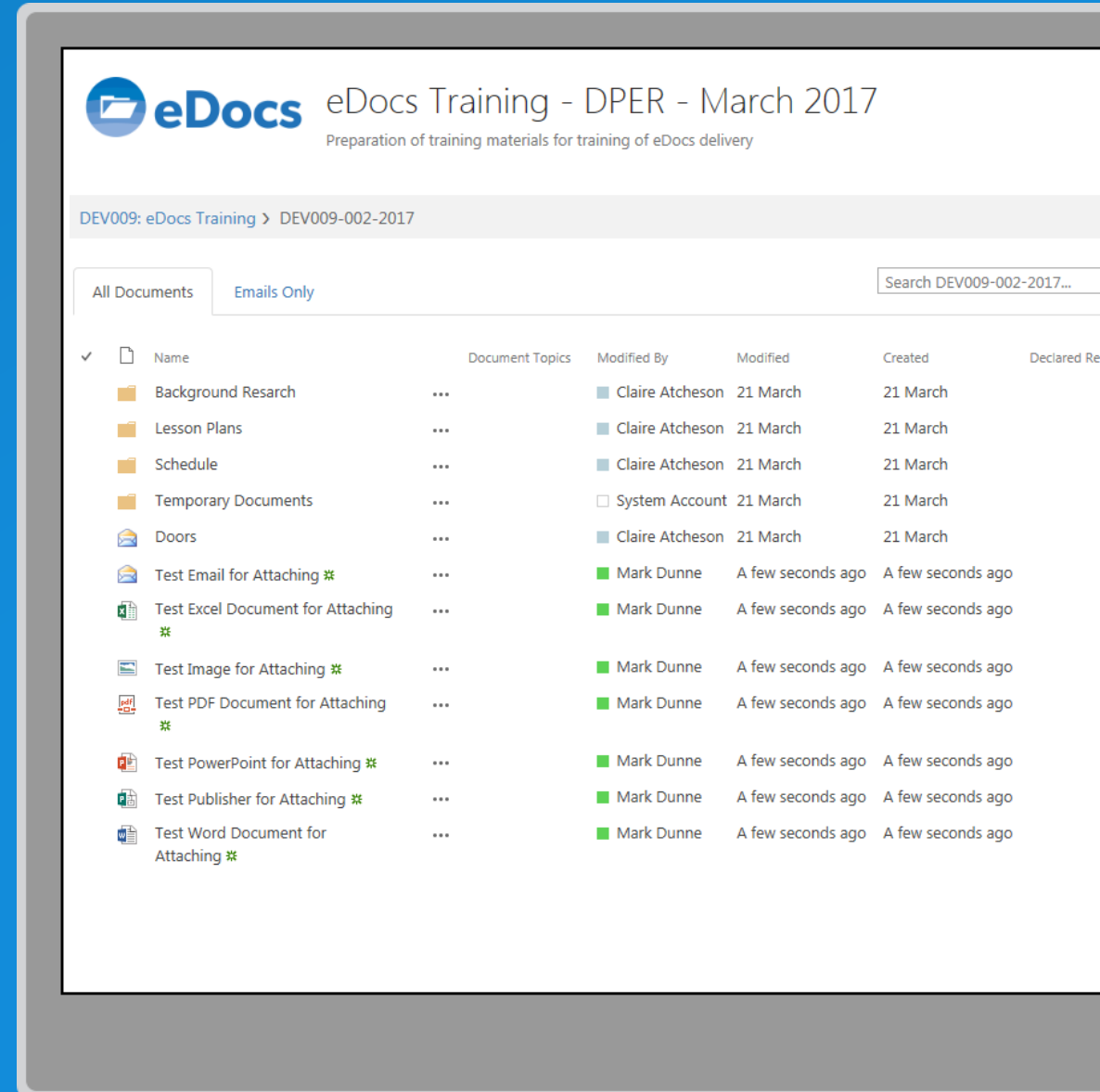
**Easy to find information**

**Consistency across the organization**

**Continuity**

# What is eDocs...

- A **Document** and **Records** Management System offered by the OGCIO under the Build to Share programme
- **Flexible, simple** solution offering:
  - Versioning
  - Collaboration
  - Document Sharing
  - Full Text Search
  - Office Integration
  - Automated Archiving
  - Physical File Association





# eDocs

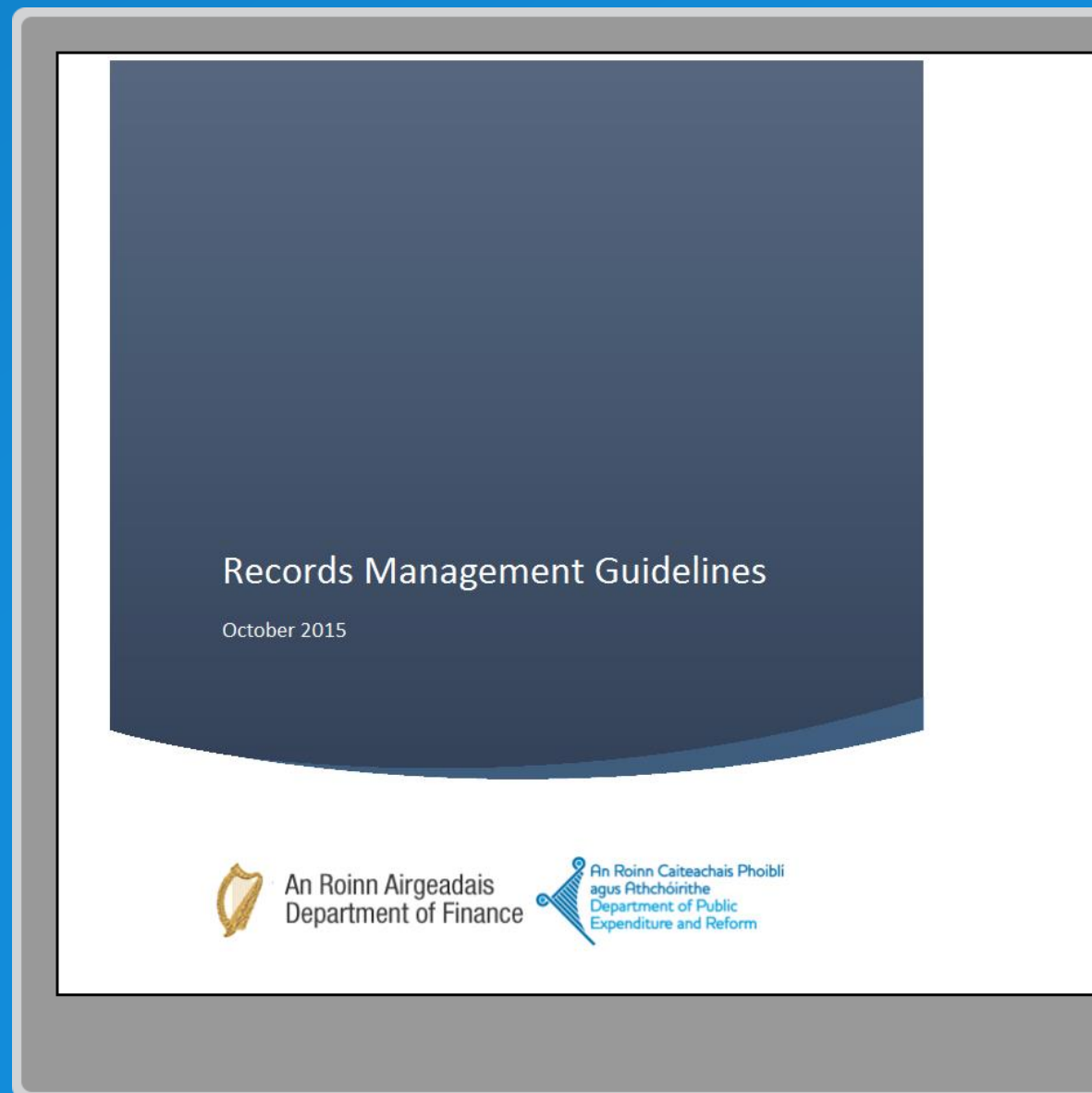
## Principles...

- Based on old filing practices (**old rules are still good rules**)
- Based on two levels of classification (Containers + Files)
  - **DPE035** single container used by OGCI0
  - **OGPSE** is one of the many containers used by OGP
  - Users create **electronic files** within their container(s)
- Daily work carried out within **Electronic Files**
  - Removes dependency on **Shared Drives**
  - **Emails** of evidential value can be filed
  - Promotion to **Records** (Manually or Automatically after 3 years of inactivity)
  - **Taxonomy** to tag files for easy retrieval



# The Framework...

- OGCIO provide **Structure** and **Templates**
  - Records Management Policy
  - eDocs Filing Business Rules
  - Information Management Guidelines
- **Governance** tools and **best practices**
  - **IO Officers** Network
    - Quarterly meetings (feedback, updates)
    - Quarterly checklist
  - Internal Audit
    - Health check and checklists
  - Management Reports (Usage & Trends)



# Electronic files...

- Any user with access to **eDocs** can create an **electronic file**
- Electronic File
  - File = **1 Topic + window of time**
  - Automatically assigned a **File Reference**
  - Select Contact(s)
  - Select Topic(s)
    - Organisation wide e.g. Circular
    - Section Specific e.g. Inheritance Tax, VAT
- File **permissions** automatically applied based on AD Membership if desired

The screenshot shows a web application interface for creating a new electronic file. The main form is titled "Create new Electronic File" and contains several sections for data entry. At the top, there is a checkbox for "Manual File Ref required (File Registry - Must be in format 'SubSeries-000-YYYY')". Below this is a required field for "Title" with the value "Sample Project Q 2017". The "Description" field contains "Sample Electronic File containing folders, files and physical parts". The "Security Classification" is set to "Unclassified". The "Topics" field shows "Procurement Training" with a link to request a new topic. There are radio buttons for "Disposition Review" (Yes/No), with "No" selected. The "Cross Reference Number" is "12345-678" and the "Old Reference Number" is "876-54321". The "Contact" field shows two selected users: "Mark Dunne" and "Seamus Walsh". The "Comments" field contains "This is sample". At the bottom are "Create" and "Cancel" buttons. In the background, a sidebar shows a list of file details including File Reference, Contact, Topics, Opened On, Review Date, Last Updated, Security Classification, and Comments. Below this is a "Shared With" section and a "Physical Parts" table with columns for PART, TITLE, and L. The table shows one entry: "PART0", "EDocs Training Signed Contract", and "- B Ca". At the bottom, it says "Showing 1 to 1 of 1 physical parts".

Create new Electronic File

☐ Manual File Ref required (File Registry - Must be in format "SubSeries-000-YYYY")

\* **Title:**

Sample Project Q 2017

**Description:**

Sample Electronic File containing folders, files and physical parts

**Security Classification:** ?

Unclassified

\* **Topics:**

Procurement Training

To request a new topic [click HERE](#) or email your Information Officer

**Disposition Review:** ?

☐ Yes ☒ No

**Cross Reference Number:**

12345-678

**Old Reference Number:**

876-54321

\* **Contact:**

Mark Dunne x Seamus Walsh x

**Comments:**

This is sample

Create Cancel

File Reference: DEV000

Contact: Claire

Topics: Education, ICT Training, Language

Opened On: 21/03/2017

Review Date:

Last Updated: 16/06/2017

Security Classification: Unclassified

Comments:

Shared With

Find physical part...

Physical Parts

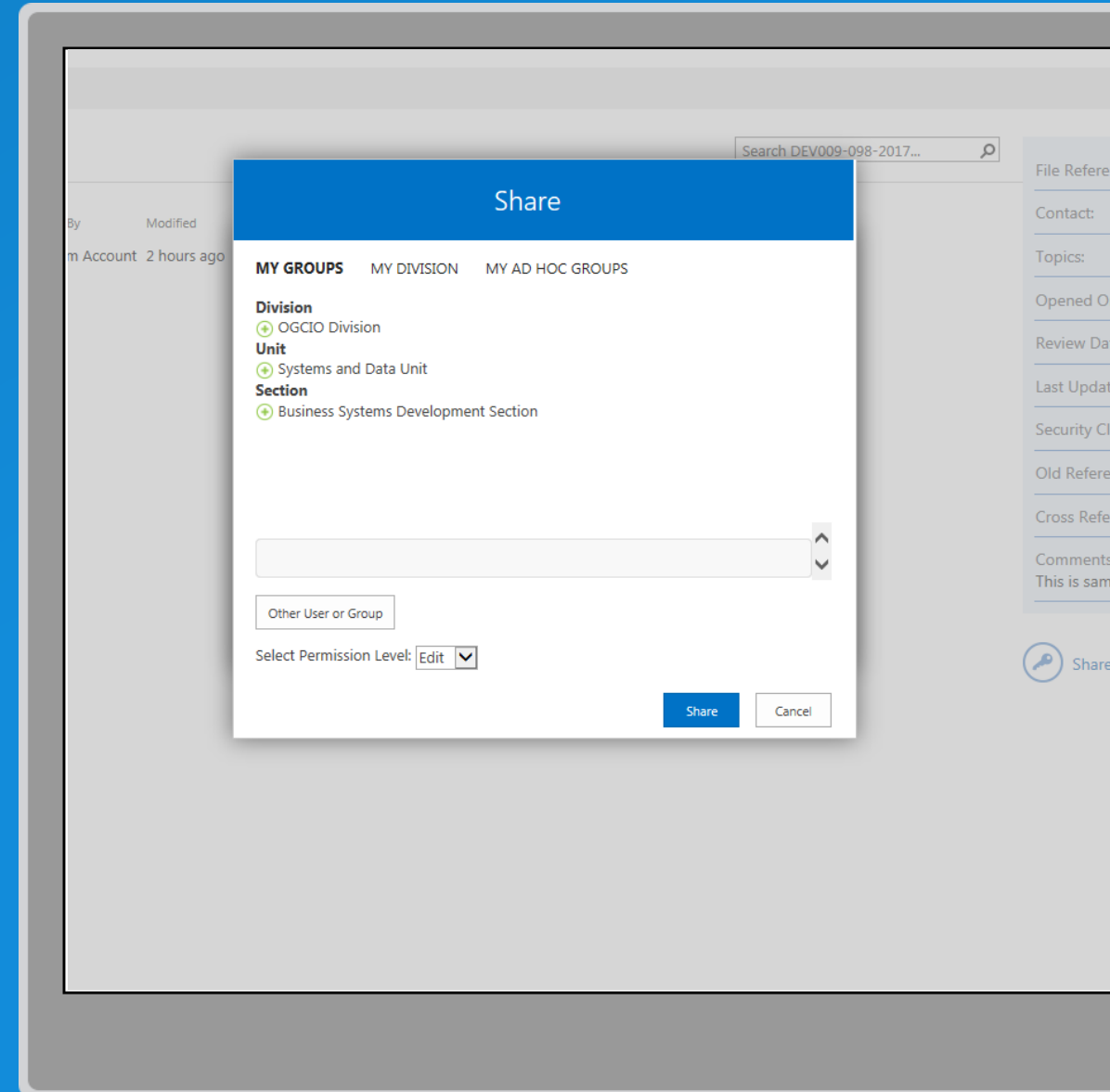
PART	TITLE	L
PART0	EDocs Training Signed Contract	- B Ca

Showing 1 to 1 of 1 physical parts

# Share Documents

End users can share files, folders and documents

- Users don't need IT to setup "shared folders"
- Linked to **Active Directory**
  - Share with my Division
  - Share with my Section
  - Share with named individuals
- Specify **Edit** or **Read** permissions
- View who currently has permissions



# Physical Parts

eDocs supports linking Electronic and Physical Files

- Track where physical files are currently located
- Clearly identify who the current contact(s) for the physical files are
- Allows Physical Parts to be isolated for search purposes

The screenshot shows a web application interface for creating a physical part. The main form is titled "Create Physical Part" and contains several input fields and checkboxes. The form is set against a blue background. To the right of the form, there is a sidebar with various metadata fields and a list of actions.

**Create Physical Part**

**Part Title:**

☐ Use Title as per Parent

**Description:**

**\* Location:**

**\* Contact:**

**Disposition Review:**  
☐ Yes ☒ No

**Cross Reference Number:**

**Old Reference Number:**

**Comments:**

**Metadata Fields (Right Sidebar):**

- File Reference:
- Contact:
- Topics:
- Opened On:
- Review Date:
- Last Updated:
- Security Classification:
- Old Reference:
- Cross Reference:
- Comments: This is sample

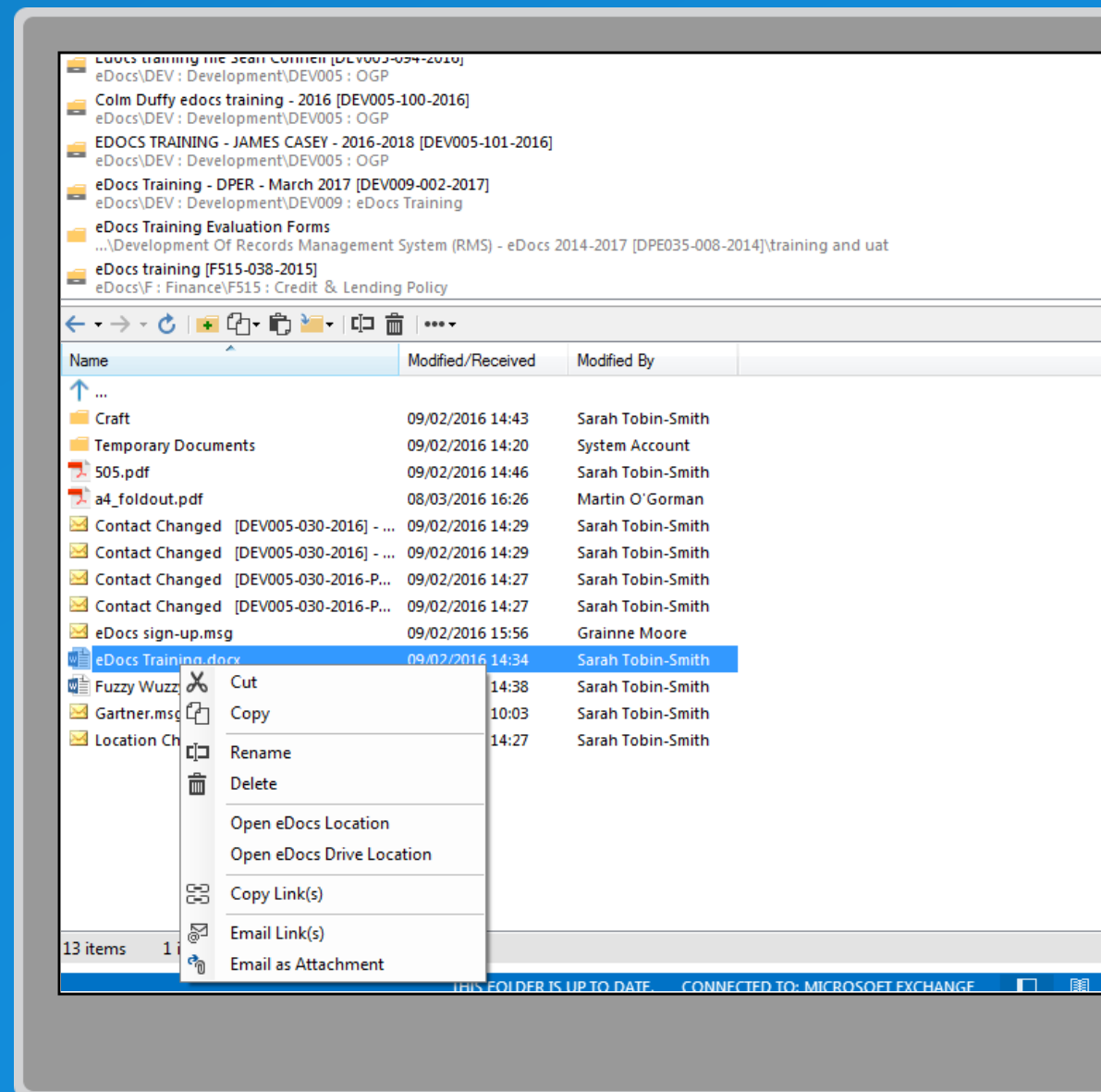
**Actions (Bottom Right):**

- Shared With
- Create Physical
- Edit Fields
- Cancel Electron
- Update Contac
- Mark as Archiv

# MS Outlook Integration

File **emails** of evidential value directly from **Outlook**

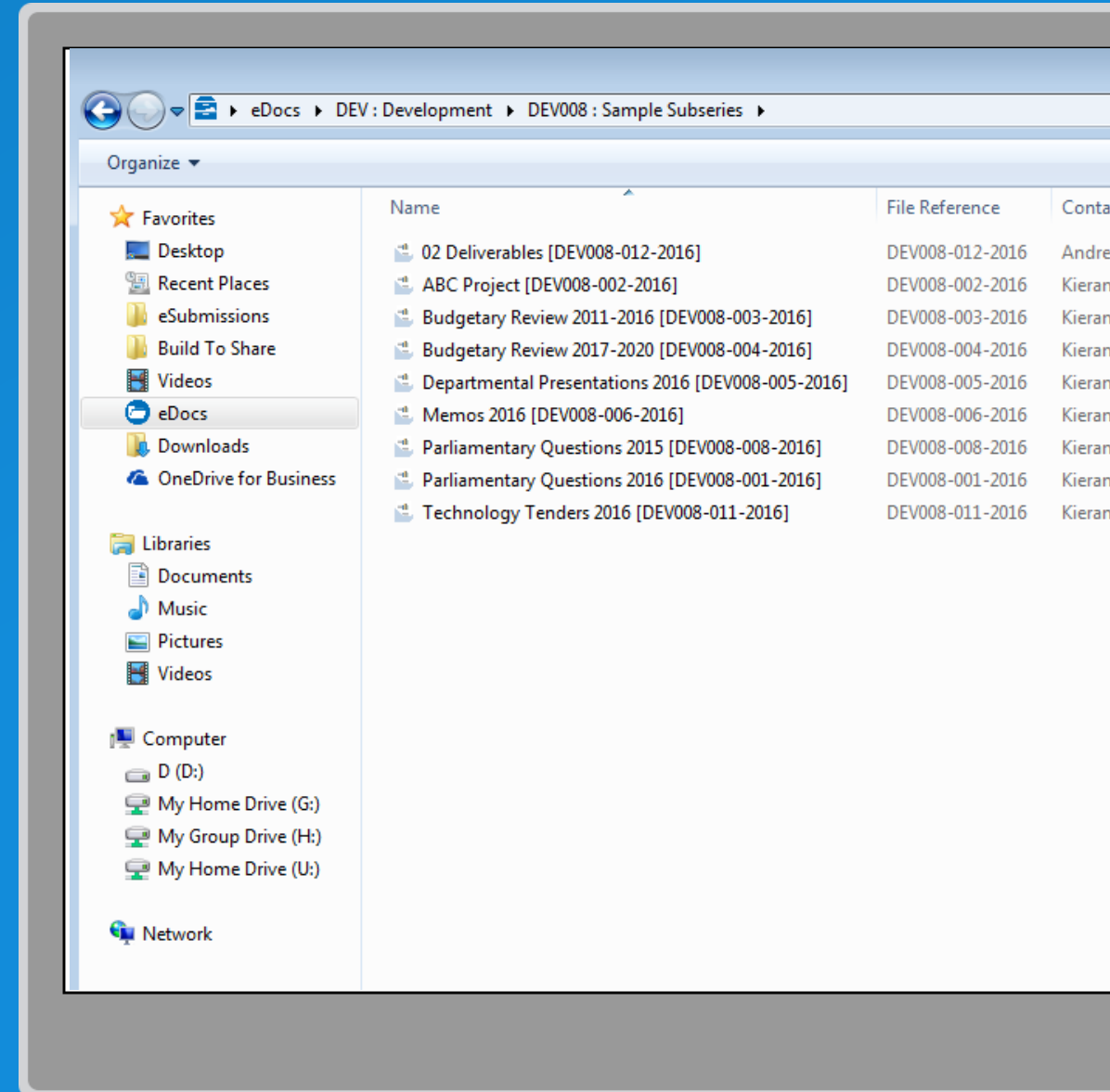
- **Drag** and **Drop** emails and their attachments directly into eDocs
- **Attach** a document from eDocs to an email
- **Send a link** to an eDocs document or folder
- **Search** eDocs directly from within Outlook



# eDocs Explorer

Access eDocs through windows explorer providing a familiar look and feel to end users

- View and Search eDocs through **Windows Explorer**
- **Copy** and **Paste** to and from eDocs
- **Drag** and **Drop** files directly into eDocs
- Save to eDocs from **Microsoft Office**
- Open files from Windows Explorer



# The Build to Share Family

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Thank You!