Cómo agilizar el proceso de publicaciones: EzShare y pasos SEC/ATI en Convergencia

Mejores tips para guardar documentos en EZshare, poderles dar disclose y/o reemplazar un documento con una nueva versión. También aprenderás qué rol tienen los “publishers” de tu unidad y cómo resolver problemas con EZshare para publicar en Convergencia.

Presentadoras:
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Carolina Osorio (ISU),
Irene Vega (SEC)

Fecha: 20 de junio
Sala: SE-0745
Hora: 3 pm

Regístrate en: http://mylearning
Agenda

• Roles in ezShare and the ATI Workflow
• What to disclose?
• How to disclose?
• Publisher’s Role and Actions
• Adding a Correction (Undisclose)
• Tips and Best Practice
• Support
## Roles in ezShare and the ATI Workflow

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Originator / Author / Owner</strong></td>
<td>A Bank employee responsible for producing/receiving documents and saving/classifying them in the ezShare platform; by default the person who uploads the document</td>
</tr>
<tr>
<td><strong>ATI Publisher</strong></td>
<td>In charge of completing the ATI workflow in ezShare, which discloses documents to the public. The Publisher’s Unit should match the Author’s Unit</td>
</tr>
</tbody>
</table>
One Person – Multiple Roles

Author
ezShare

Operational Analyst
Convergence

Departmental Reviewer
Publications Module

ATI Publisher
ATI Workflow

Martín Rodríguez
KIC
Roles in ezShare and the ATI Workflow

By default the person who uploads the document to ezShare; can be modified.
<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibility</th>
<th>Disclose?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Leader</td>
<td>In charge of managing the execution and activities of an IDB project, including disclosure of information; can decide which deliverables are Knowledge Products</td>
<td>YES</td>
</tr>
<tr>
<td>Alternative Team Leader</td>
<td></td>
<td>YES</td>
</tr>
<tr>
<td>Operations Analyst</td>
<td>In charge of completing the deliverables of a project; commonly the roles who monitor the publication process</td>
<td>YES</td>
</tr>
<tr>
<td>Project Assistant</td>
<td></td>
<td>YES</td>
</tr>
<tr>
<td>Unit / Division Manager</td>
<td>In charge of approving publications</td>
<td>NO</td>
</tr>
</tbody>
</table>
Before upload a final PDF

- ✔️ Check that the final PDF meets all the requirements (Checklist)
- ✗ Try to avoid formatting problems
- ✔️ Be aware that in Convergence you are not allowed to step back
What and When to Disclose?

Disclose the FINAL version of the publication AFTER the PRO step.
How to Start the ATI Disclosure Workflow?

Use this function to publish/disclose annexes, appendixes and links that are part of key documents; as well as other auxiliary documents related to the operation. Please note that main documents (i.e.: PP, LP, TC Document, etc.) must be published/disclosed through the corresponding life cycle milestone.

**ezShare Number of the final version of the publication**

**Enter the Relevant Disclosure Activity**

[Image showing the publication details and options for publishing]
In order to complete the metadata and approve or reject the document, the Publisher can access the document through the following options:

- Click the link in the email received to access document properties.
- In the ATI Portal (Pending Tasks) the Publisher can see their pending documents for authorization.
- Or accessing document properties from the Edit Properties button.


PUBLIC DISCLOSURE CLASSIFICATION

PUBLIC ACTION

Publisher Actions Pt. 1
To authorize disclosure of the document the required fields must be completed (*). … and click on the Disclose button.

There is no need to fill out the metadata if the document will be **Rejected**.
The Publisher will **authorized** or **rejected** your document and you will receive an email with that information.

http://www.iadb.org/document.cfm?id=EZSHARE-1325955600-11029
New version of a document

To save a new version in the same EZshare number:

1. The author need to change it **from disclosed to undisclosed**
2. Then, the author need to **save it as Confidential**
3. Only **as a Confidential you can replace** the file in ezShare
4. Once it is replaced, **the author can disclose it again**
5. The publisher needs to **approve the new version again**
6. The publication needs to be published on the website before the correction workflow should be started
How to Add a Correction?

1) Click on the 'Add correction' button.

2) Add the corrections for the following tasks:
   - Professional Editor Upload/Final Document (PRO)
   - Metadata Editing - Pro Version (MEP)
   - Library Closing Review (CLS)
3) Access the operation’s ezShare site.

4) Access the 25. Results Management library.

5) Check the document and select “View Properties”.

6) The person who is listed as the document author of the PRO file in ezShare opens the ATI Portal.
7) In the ATI Portal, the ezShare author selects “My Disclosed Documents”.

8) Find the disclosed document.

9) Click “Undisclose”.

10) Select “Confidential”.

11) Click “Undisclose”.

12) In the source library drag and drop the updated version of the publication with the **exact same file name and extension** into the library.

13) Click “Replace it”
14) In the Publication Module, go to the Correction workflow and select the PRO step.

15) Select “Link to Existing Document”.

16) Enter the ezShare number into the text box.

17) Click “Search”.

18) Select the document.

19) Click “Add”.

The workflow will now follow the accustomed steps as in the previous publication submission process.
Tips and Best Practice

• Before you upload the final version in the PRO step, think twice
• Know who has which roles in your Sector/Unit in the systems
• For roles in Convergence, see Operation Data -> Responsibility Data
• When you save a document in ezShare, estimate at least on hour for indexing
• The author in ezShare is the person who uploads the document to ezShare
• The person who uploads the document in Convergence doesn’t have to be the author of the Publication
• The author in the Publication Module in Convergence is the author of the Publication
• When you replace a document with a new version in ezShare it has to be the same name, format and extension
<table>
<thead>
<tr>
<th>If you need to contact...</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convergence</td>
<td><a href="mailto:convergence@iadb.org">convergence@iadb.org</a></td>
<td>Ext. 1111 option 2</td>
</tr>
<tr>
<td>ezShare</td>
<td>ITE Chat</td>
<td>Ext. 1111 option 3</td>
</tr>
<tr>
<td>ATI Helpdesk</td>
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<td>Ext. 1946</td>
</tr>
<tr>
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