



Patrocinadores Oro:



Patrocinadores Plata:



Patrocinadores Bronce:



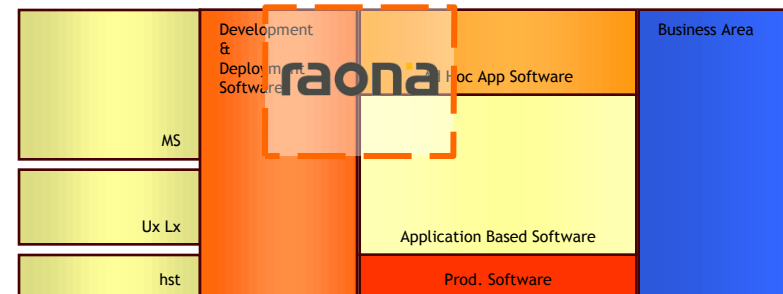
Gestión Documental Orientada a ISO 9000

raona

Oriol Quinquilla Capdevila
Project Manager / Team Leader
oriol.quinquilla@raona.com



¿Y si sobresaliéramos dónde la tecnología realmente aporta valor?



Raona: una nueva especie. Un nuevo concepto de empresa y de servicio.

la empresa con más certificaciones.



Microsoft
GOLD CERTIFIED

Partner

Advanced Infrastructure Solutions
Business Process and Integration
Custom Development Solutions
Data Management Solutions
Information Worker Solutions
Networking Infrastructure Solutions

Advanced Infrastructure

- Diseño e implementación y Migraciones
- Microsoft Identity Integration Server y Active Directory
- Administración de datos en Microsoft SQL Server 2005
- Administración de archivos
- Administración de sistemas basados en Microsoft SMS

Business Process & Integration Solutions

- EAI - B2B - BPM
- Administración de derechos digitales
- Extranet/Hosting
- Desarrollo de portales y aplicaciones Web
- Soluciones de Dirección y de flujo de trabajo basados en web

Custom development

- Soluciones de desarrollo personalizadas
- Desarrollo de Aplicaciones de Infraestructura
- Desarrollo Smart Client
- Desarrollo Web

Information Worker

- Tecnologías de comunicación y colaboración.
- Portals
- Administración de Proyectos
- Administración de Procesos
- Soluciones de Productividad Empresarial

Networking Infrastructure

- Conectividad Wireless Segura
- Red Virtual Privada (VPN)
- Administración Perimetral
- Operaciones y administración de seguridad
- Administración de accesos y identidad

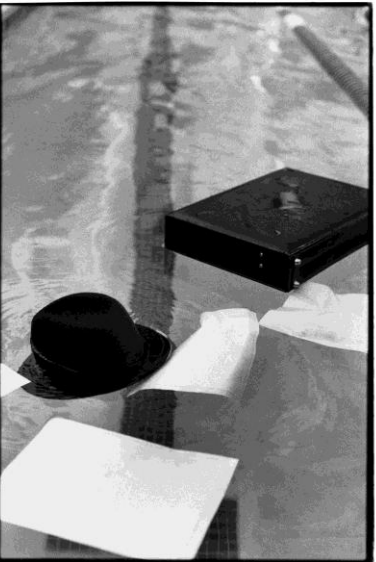
Data Management



Office SharePoint
Server 2007

raona, una ingeniería de software,

*orientada al cliente
para implantar
tecnologías de la información* **éxito.**
con éxito.



• 2006 •
2005
2004
• 2003

Logos of client companies and partners:

- CARBUROS METALICOS
- CÍRCULO de LECTORES
- Microsoft
- Gelos
- InfoJobs
- Aplus
- MANGO
- TELSTAR
- ALSYS
- PRE NATAL
- mpm
- Caixa Penedès
- BEHR
- GABARRÓ
- andbanc
- Institut Municipal d'Assistència Sanitària
- TORRES PAPEL
- AIQUÉS DE REUS
- Atos Origin
- TORRES
- CASS
- HORMIPRESA
- NUTREXPA
- FGC
- SIEMENS
- Grupo CATALANA OCCIDENTE
- ebankinter
- Banco Pastor
- calxaterrassa
- AOC
- mega training
- CAT 365
- aulaDAT
- alhambra eidos
- netmind
- UOC
- ict
- PROFESSIONAL training
- CAT365
- CAIXA LAIETANA

Microsoft Office SharePoint Server 2007



equipo raona selección natural,

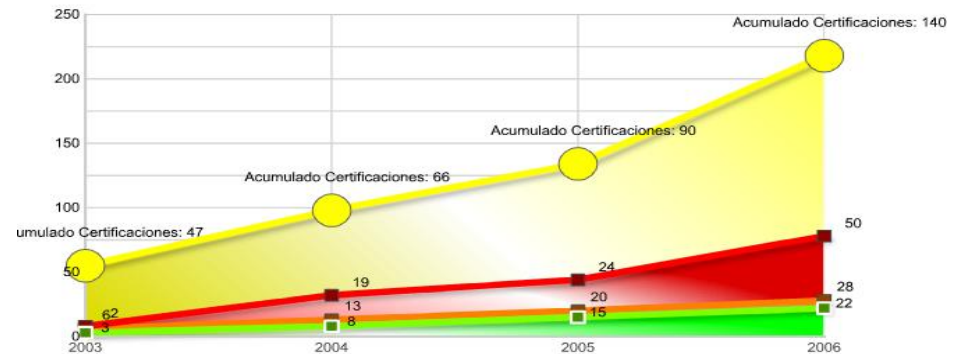
Con cada generación se incrementa y mejora la proporción de individuos.

Charles Darwin

Somos un equipo emprendedor y dinámico. Desde 2003 hemos crecido en número, y en calidad.

Profesionales reconocidos y especializados en diferentes disciplinas para responder eficazmente a sus necesidades y las de su empresa.

Certification evolution since 2003



Raona certification ratio: **5,7** (based on average certificationxengineer)

Gestión Documental Orientada a ISO 9000

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Agenda

- I. Requerimientos según Calidad
- II. Requerimientos según IT
- III. Implantando la ISO en Sharepoint Server 2007
- IV. Preguntas y comentarios

Agenda

- I. Requerimientos según Calidad**
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Requerimientos GD ISO 9000, según Calidad

- Colaboración (almacenaje) de documentos
- Jerarquía de documentos: por tipo/por departamento/por geografía
- Permisos por carpeta (y estado del workflow)
- Control de versiones: drafts y publicadas
- Varios tipos de documento

Requerimientos GD ISO 9000, según Calidad

- Mecanismo de aprobaciones: serie, 2-4 personas
- Visibilidad / acceso al documento según el estado del workflow
- Notificaciones y alertas del estado del documento
- Publicación de la última versión aprobada

Requerimientos GD ISO 9000, según Calidad

- Información de trabajo
 - Documentos que se están modificando actualmente
 - “Mis documentos pendientes de aprobación”
 - Documentos pendientes de aprobación de cualquier usuario
 - Última versión de todos los documentos
 - Filtros

Requerimientos GD ISO 9000, según Calidad

- Poder continuar un documento a partir de una versión publicada
- Histórico de acciones.

Requerimientos GD ISO 9000, según IT

- Office: Word, Excel. PDF.
- Configurar usuarios desde grupos Active Directory.
- Integrar con el sistema de mensajería (en general Exchange).
- Sencillo de customizar, pero controlar quien customiza
- Rendimiento.
- Migrar los documentos de Sharepoint 2001.

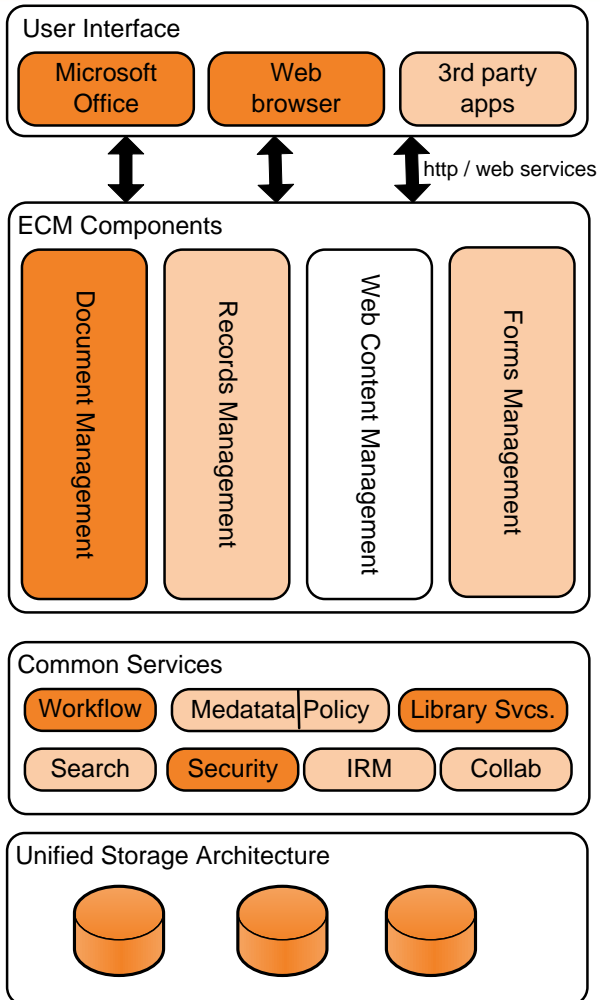
Agenda

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Implantando una GD ISO 9000 en MOSS 2007

- ◉ Estructura de proyecto
 - ◉ Planning
 - ◉ Migration Planning
 - ◉ Customization
 - ◉ Deploy
 - ◉ Migrate

Customization de MOSS 2007 para GD ISO 9000



Desarrollo



Configurar / customizar

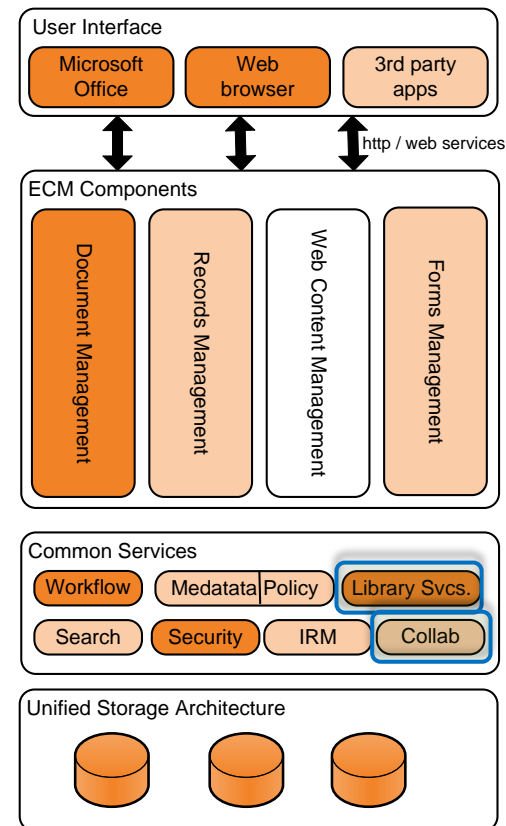


Out-of-the-box

Customization de MOSS 2007 para GD ISO 9000

Library Services & Collaboration

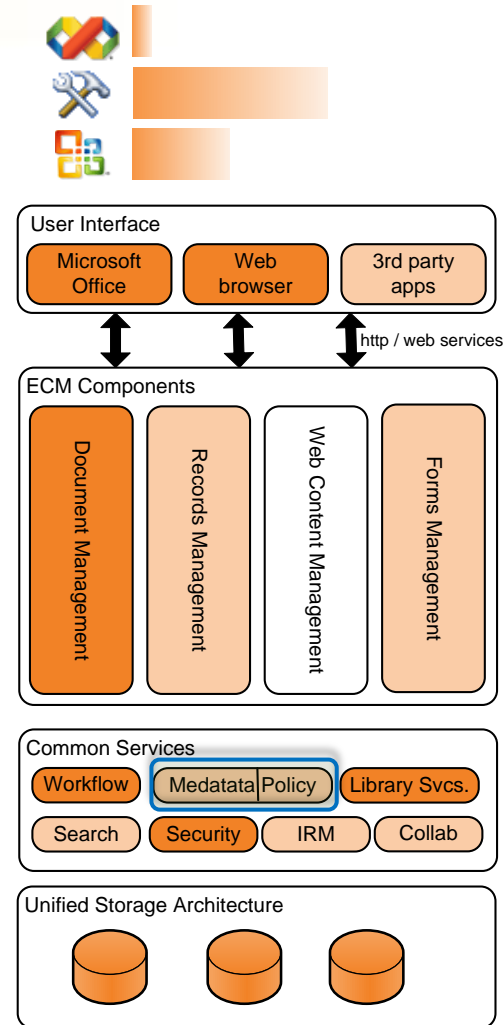
- Estructura de almacenaje (sites, Document Libraries, carpetas)
- Check-out, check-in
- Check-out to local
- Major / minor versioning
- Recycle Bin
- Alertas
- (+ discusiones, tareas, gantt view, etc.)



Customization de MOSS 2007 para GD ISO 9000

Metadata | Policy

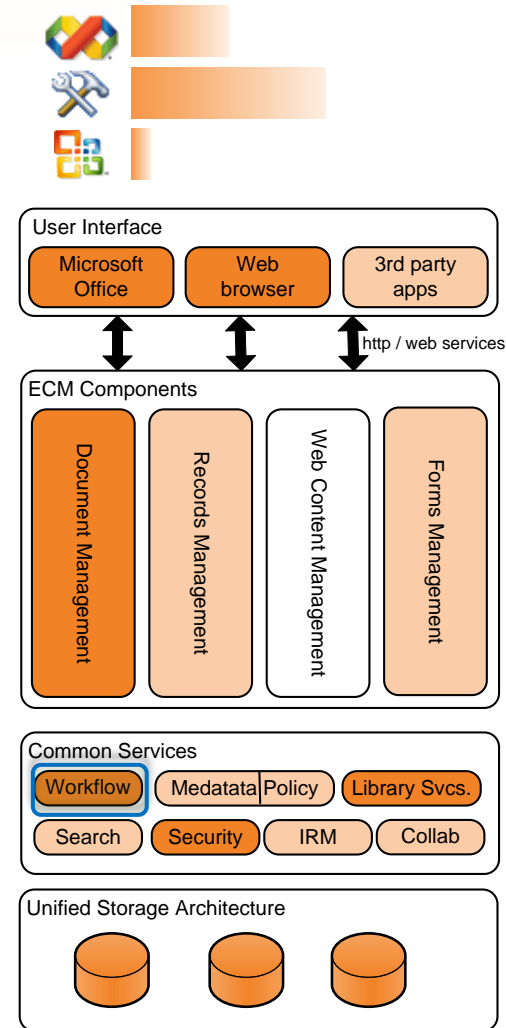
- ◉ Content types
 - ◉ Metadata
 - ◉ Template
 - ◉ Custom Forms
 - ◉ Workflows
- ◉ Policies:
 - ◉ Expiración
 - ◉ Auditoría
 - ◉ Otros: etiquetado, código de barras



Customization de MOSS 2007 para GD ISO 9000

Workflow

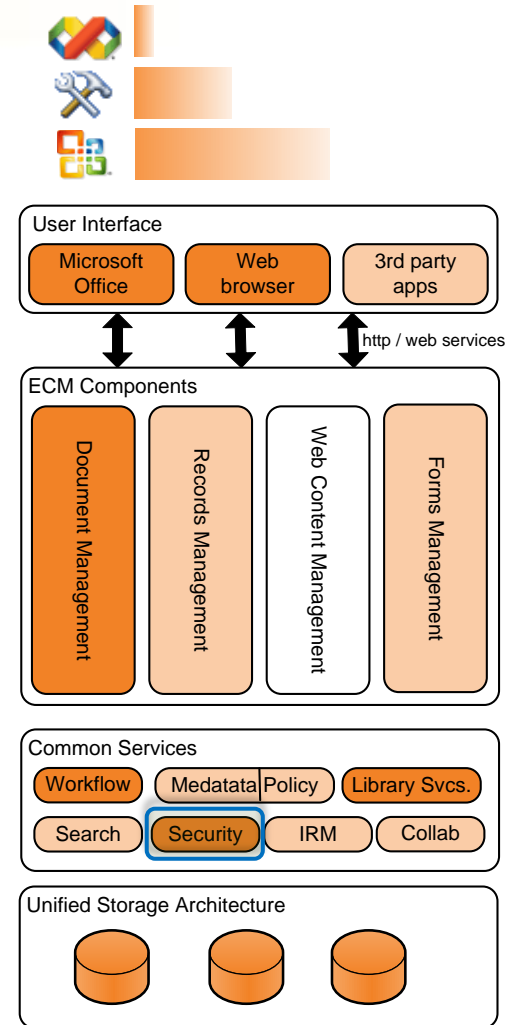
- ◉ Basados en Windows Workflow Foundation
- ◉ Out-of-the-box
 - ◉ Aprobación N usuarios en paralelo
 - ◉ Aprobación N usuarios serie
 - ◉ Multifirma
- ◉ Customizable
 - ◉ Sharepoint Designer
 - ◉ Visual Studio
- ◉ Alertas



Customization de MOSS 2007 para GD ISO 9000

Search

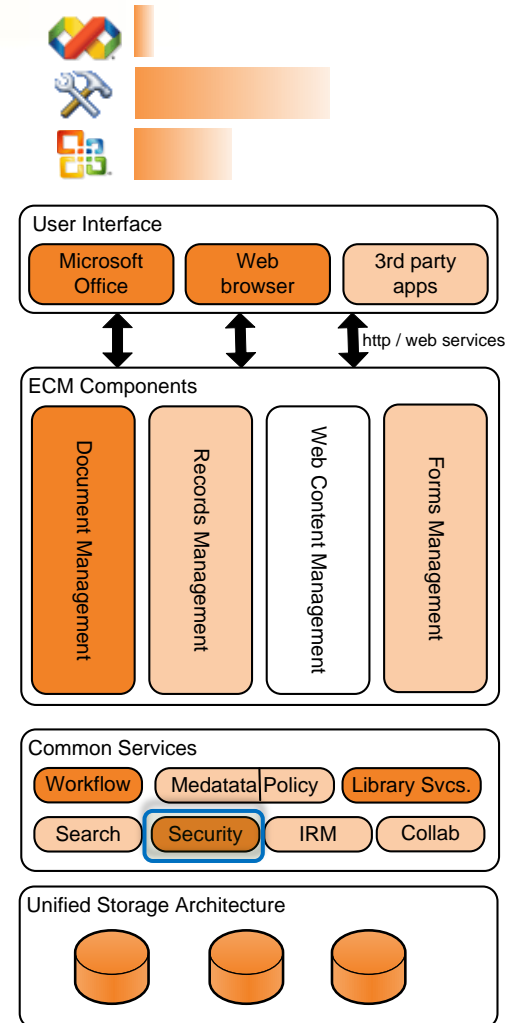
- By Content Type



Customization de MOSS 2007 para GD ISO 9000

Security

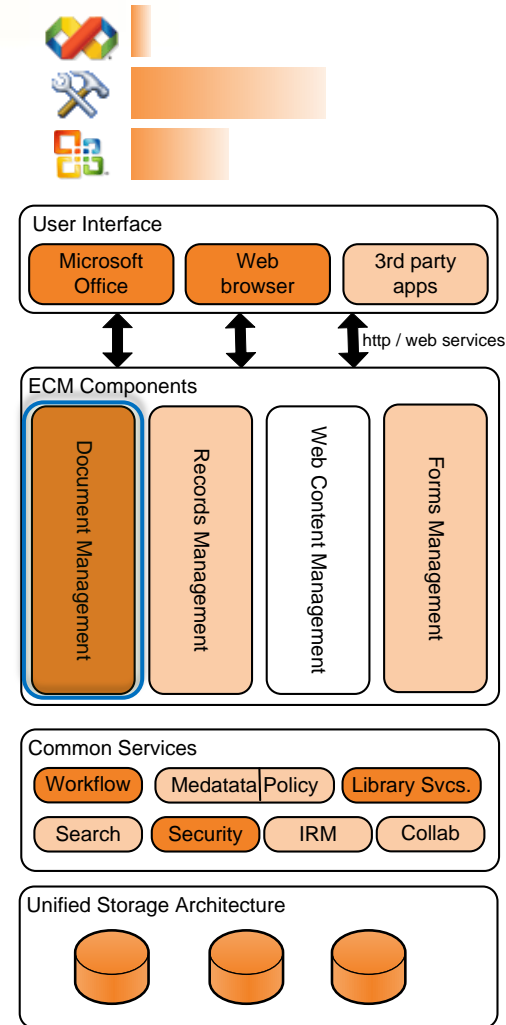
- Folder / item level security
- Basada en grupos de AD o customizado



Customization de MOSS 2007 para GD ISO 9000

Document management

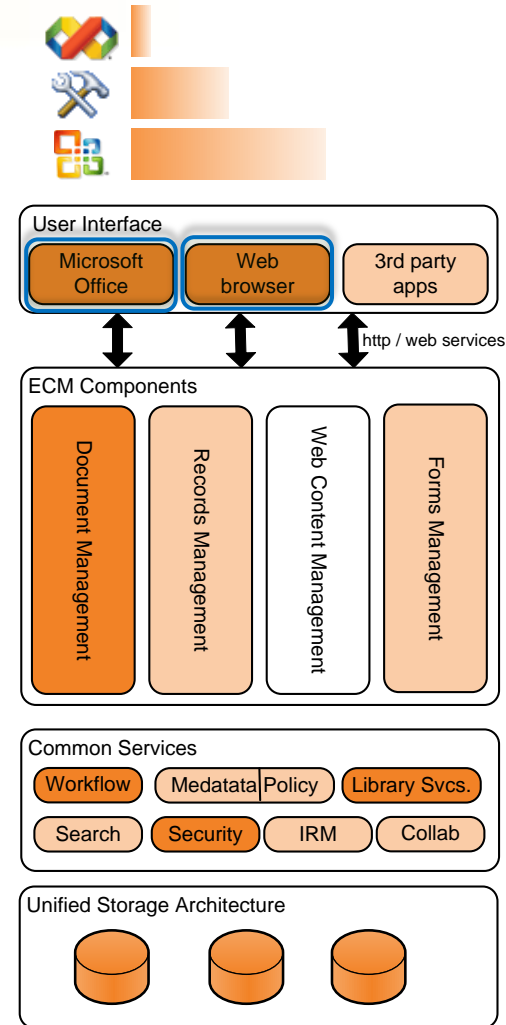
- Official File Web Service
- Records Repository Site



Customization de MOSS 2007 para GD ISO 9000

User interface

- Office, Web
- Offline copies in Microsoft Outlook / Groove
- Document Information Panel
- IRM



Customize Workflow Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://moss2007/_layouts/CstWkflP.aspx?List={153B9A46-90DF-4DB2-AF39-CEA27ABC6CE6}

Home Site Actions

Home > Shared Documents > Customize Workflow

Customize Workflow: approval

OK Cancel

Workflow Tasks

Specify how tasks are routed to participants and whether to allow tasks to be delegated or if participants can request changes be made to the document prior to finishing their tasks.

Assign tasks to:

- All participants simultaneously (parallel)
- One participant at a time (serial)

Allow workflow participants to:

- Reassign the task to another person
- Request a change before completing the task.

Default Workflow Start Values

Specify the default values that this workflow will use when it is started. You can opt to allow the person who starts the workflow to change or add participants.

Type the names of people you want to participate when this workflow is started. Add names in the order in which you want the tasks assigned (for serial workflows).

Approvers... MOSS2007:orid; MOSS2007:terdi

- Assign a single task to each group entered (Do not expand groups).
- Allow changes to the participant list when this workflow is started

Type a message to include with your request:

Due Date

If a due date is specified and e-mail is enabled on the server, participants will receive a reminder on that date if their task is not finished.

Tasks are due by (parallel):

Give each person the following amount of time to finish their task (serial):

Day(s)

Notify Others

To notify other people when this workflow starts without assigning tasks, type names on the CC line.

CC...

Complete the Workflow

Specify when you want the workflow to be completed. If you do not select any options, the workflow will be completed when all tasks are finished.

Complete this workflow when:

- Following number of tasks are finished:

Cancel this workflow when the:

- Document is rejected
- Document is changed

Post-completion Workflow Activities

Specify the actions you want to occur after the workflow has been successfully completed.

After the workflow is completed:

- Update the approval status (use this workflow to control content approval)

OK Cancel

Demostracions dia 1.doc (Compatibility Mode) - Microsoft Word

Home Insert Page Layout References Mailings Review View

Shapes Cover Page Pages Tables Pictures Illustrations Links Header & Footer Text Symbols

Demostració 12: Configuring Security Policies

usuaris que treballin en internet Zone no tinguin permisos d'escriptura

- Anar a Central Administration Site
- Application management

signa

Requested Signatures
To request signatures be added to this document, type the names of the people who need to sign on the Signer lines. Each person will be assigned a task to add their signature to the document. You will receive an e-mail when the request is sent and once everyone has finished their tasks.

Suggested signer: David
Signer... david@raona.com

Suggested signer: Maria
Signer... maria@raona.com

Request signatures in the order above, rather than all at once.

Notify Others
To notify other people when this workflow starts without assigning tasks, type names on the CC line.
CC...

Start Cancel

Page: 7 of 7 Words: 1.609 Catalan

start | Inbox - Microsoft ... | moss2007 - Remot... | Digital Signing - Of ... | http://moss2007/... | Problems with Jaz... | Microsoft PowerPo... | Demostracions dia... | 100% | 22:58

Office Online Beta

Sign in to My Office Online (What's this?) | Sign in

- Home
- Products
- Help and How-to
- Downloads
- Clip Art
- Templates
- Office Live

Office Marketplace

Search Office Marketplace

Personalize Office Online

Free training

Office downloads

Office Marketplace

Marketplace Provider Area

- » Become a Provider
- » Manage Your Listings
- » Apply in International Markets

Marketplace Resources

- » Suggest a Service
- » Get Answers from Other Office Users
- » Marketplace Site Help

Support and Feedback

- » Product Support
- » Send Us Your Comments

Additional Resources

- » Try an Office Product
- » For Small Businesses
- » Work Essentials

Home > Downloads > Office Marketplace > Get a professional edge

Digital Signing

Items 1-4 of 4, sorted by rating Page: [1] Next

- secure2sign: State of the art digital signing**
 Provided by: Jenas Enterprises T/As Avoco Secure
 Rating: ★★★★★ (65 votes)
- secure2trust: Control content access for Microsoft® Office**
 Provided by: Jenas Enterprises Ltd t/As Avoco Secure
 Rating: ★★★★★ (130 votes)
- IntelliSafe Vault® Desktop: Digitally sign, send, and securely store documents**
 Provided by: IntelliSafe Technologies
 Rating: ★★★★★ (297 votes)
- CoSign Electronic Signatures: CoSign is an electronic signature solution**
 Provided by: ARX (Algorithmic Research)
 Rating: ★★★★★ (99 votes)

Items 1-4 of 4, sorted by rating Page: [1] Next

advertisement

Demostració	Procediment
<p>Dia 1 Demostració de canvis en <u>Windows sharepoint Services 3.0</u></p>	<p>1. <u>Mostrar una de les noves característiques de Windows sharepoint Services 3 que es la de major and minor versioning</u></p> <ol style="list-style-type: none"> <u>Anar a una document library</u> <u>Settings</u> <u>Versioning</u> <p>NOTA: En el mateix lloc:</p> <ol style="list-style-type: none"> <u>Modificar la library per dir que necessita aprovacions</u> <u>Configurar que usuaris poden veure i editar draft items.</u> <u>Modificar l'opció de require check out els documents abans de editar-los.</u> <u>Veure com això afecta als usuaris</u>
<p>Dia 1 Demostració 2: Document <u>collaboration</u></p>	<p>1. <u>Mostrar una de les noves característiques de Windows sharepoint Services 3 que es la de major and minor versioning</u></p> <ol style="list-style-type: none"> <u>Anar a una document library</u> <u>Settings</u> <u>Versioning</u> <p>NOTA: En el mateix lloc:</p> <ol style="list-style-type: none"> <u>Modificar la library per dir que necessita aprovacions</u> <u>Configurar que usuaris poden veure i editar draft items.</u> <u>Modificar l'opció de require check out els documents abans de editar-los.</u> <u>Veure com això afecta als usuaris</u>

Start New Workflow

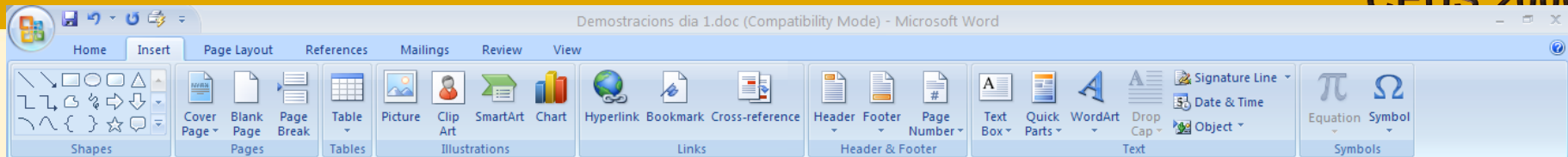
Workflows available for this document:

Name: Collect Feedback
Document Library: [Shared Documents on Home](#)
Description: Routes a document for review. Reviewers can provide feedback, which is compiled and sent to the document owner when the workflow has completed. [Start](#)

Name: Collect Signatures
Document Library: [Shared Documents on Home](#)
Description: Gathers signatures needed to complete a Microsoft Office document. This workflow can be started only from within an Office client. [Start](#)

Name: signa
Document Library: [Shared Documents on Home](#)
Description: Gathers signatures needed to complete a Microsoft Office document. This workflow can be started only from within an Office client. [Start](#)

[Close](#)



Signature Setup

Suggested signer (for example, John Doe):

Suggested signer's title (for example, Manager):

Suggested signer's e-mail address:

Instructions to the signer:
 Before signing this document, verify that the content you are signing is correct.

Allow the signer to add comments in the Sign dialog

Show sign date in signature line

OK Cancel

- usuaris que treballin en internet Zone no tinguin permisos d'escriptura
- a. Anar a Central Administration Site
 - b. Application management
 - c. Policy for web application
2. Un cop aquí
- a. Add users
 - b. Seleccionar Internet Zone
 - c. Afegir usuaris
 - d. Denegar-li l'escriptura

X

David
Director Marketing

X

Maria
Directora I+D+I

Workflow Designer - Purchase Order Approval

Define your new workflow

Choose the type of workflow and the conditions under which this new workflow should run.

Give a name to this workflow:

Purchase Order Approval

What SharePoint list should this workflow be attached to?

Documents

Select workflow start options for items in Documents:

- Allow this workflow to be manually started from an item
- Automatically start this workflow when a new item is created
- Automatically start this workflow whenever an item is changed

Workflow Designer - Purchase Order Approval

Step Name: Step 1

Specify details for 'Step 1'

Choose the conditions and actions that define this step.

Conditions

Actions

- Send an Email
- Assign a Task
- Set Field in Current Item
- Update List Item
- Create List Item
- Copy List Item
- Check Out Item
- Check In Item
- Delete Item
- Wait For Field Change in Current Item

Define E-mail Message

To: amanda.murphy@infotechcanada.com

CC:

Subject: New Purchase Order Request Created

A new purchase order request has been created by [%Documents:Document Created By%], please visit http://wssharepoint[%Documents:URL_Path%] to approve this purchase request.

Workflow Administrator

Define Workflow Lookup

Lookup Details

Choose the data source and field to perform the lookup on:

Source: Current Item

Field: Approval

Clear Lookup

Add Lookup to Body

OK Cancel

Define E-mail Message

To: amanda.murphy@infotechcanada.com

CC:

Subject: New Purchase Order Request Created

A new purchase order request has been created by [%Documents:Document Created By%], please visit http://wssharepoint[%Documents:URL_Path%] to approve this purchase request.

Workflow Administrator

Select Users

Type a Name or E-mail Address:

Or select from existing Users and Groups:

- User from address book...
- Workflow Lookup...
- User who created current item
- Home Members

Add >>

<< Remove

Move Up

Home > Publishing > Documents

Documents

This system library was created by the Publishing feature to store documents that are used on pages in this site.

Type	Name	Modified	Modified By	Approval Status	Purchase Order Approval
Document	NewPurchaseRequest1new	4/7/2006 12:04 PM	Amanda Murphy	Draft	In Progress

NEW PURCHASE REQUEST 1 NEW

4/7/2006 11:45 AM

- View Properties
- Edit Properties
- Manage Permissions
- Edit in Microsoft Office Word
- Delete
- Send To
 - Existing Copies
 - Other Location
 - E-mail a Link
 - Create Document
- Check Out
- Publish a Major Version
- Version History
- Workflows

En resumen

Requerimientos vs implantación	
Colaboración (almacenaje) 	Poder continuar un documento 
Jerarquía de documentos 	Histórico de acciones 
Permisos por carpeta 	
Control de versiones 	
Tipos de documento 	Office: Word, Excel. PDF. 
Aprobaciones  	Active Directory 
Visibilidad / acceso 	Integrar con el sistema de mensajería 
Notificaciones y alertas 	Sencillo de customizar, pero controlar 
Publicación de la última versión aprobada 	Rendimiento 
Información de trabajo 	Migrar  

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Microsoft[®]