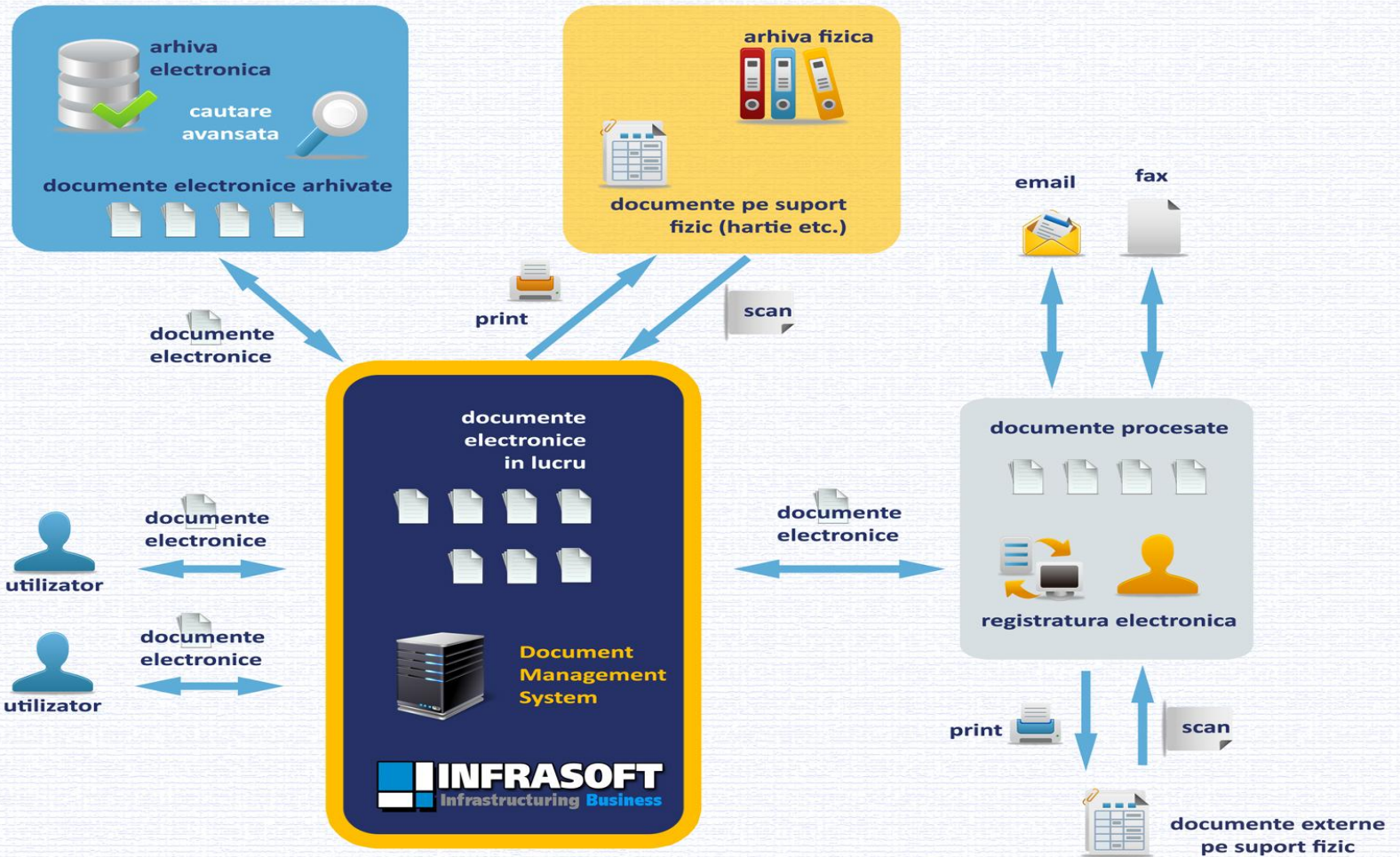


# IMPORTANTA IMPLEMENTARII UNUI MANAGEMENT AL DOCUMENTELOR IN CADRUL ORGANIZATIEI

# Ce este un DMS?

- DMS = Document Management System
- DMS = un instrument performant si eficient de management
- DMS = un program software care ne permite sa:
  - ▣ cream documente din sablon/model,
  - ▣ stocam informatiile intr-un mod organizat,
  - ▣ organizam activitatea companiei,
  - ▣ identificam rapid orice document
  - ▣ manipulam toate documentele din companie
  - ▣ regasim orice informatie din orice an
  - ▣ sa securizam documentele si accesul la ele

# Ce este un DMS?



# De ce avem nevoie de DMS?

## □ Pentru a respecta legislatia

*Ex. Legea 333 republicata, Hotararea nr. 301 din 11.04.2012*

Hotararea 301 prevede, printre altele obligatia de a avea un registru special de evidenta a contractelor de prestari servicii, un registru de pv-uri de predare-primire a serviciului, un registru al buletinelor posturilor, un registru de evenimente, etc.

Art 10 pct 2 – pastrarea acestor documente minim 2 ani!

## □ Pentru a securiza informatia din cadrul companiei

- Accesul la documente este controlat si securizat
- Versionarea permite controlul tuturor versiunilor de documente
- Pot fi instalate chei de criptare a informatiei
- Documentele nu pot fi sterse sau copiate decat cu acordul administratorului



# De ce avem nevoie de DMS?

## □ **Pentru a reduce costurile**

- Fiecare coala A4 printata, indosariata si pastrata costa compania 2 lei pe an;
- 25% din timpul angajatilor de la birou este irosit pe cautarea, printarea si regasirea de documente;
- Amenzile pentru neregulile in materie de documente, registre, etc sunt foarte mari;
- Migrarea de personal poate costa compania – transfer de know-how, pierderi accidentale sau intentionate de informatii, timp

## □ **Pentru a obtine mai usor:**

- Certificate de management al calitatii (ISO 9001)
- Certificate de management al securitatii informatiei (ISO 27001)
- Alte certificari si acreditari



# Functionalitati de baza

- Consola de lucru usor de utilizat

The screenshot displays the Documenta web application interface. At the top, the logo 'Documenta' is visible with the tagline 'Infrastructuring Business'. The user is logged in as 'Barcutean Lilia@INFRA'. The navigation menu includes 'Consola', 'Inbox', 'Index', 'Administrare', 'Rapoarte', 'Registratura', 'Activitati', and 'Favorite'. The main content area is titled 'Documente' and shows a list of documents with columns for 'Nume', 'Versiune', 'Blocat de', 'Categorie', 'Creat de', 'Creat la', 'Modificat de', and 'Modificat la'. The left sidebar shows a 'Structura' tree with folders like '\$MODELDOC', 'Acorduri parteneriat', and 'Administrativ'. The right sidebar has buttons for 'Proprietati', 'Index text', and 'Versiuni'.

SITE > Administrativ

**Structura**

- \$MODELDOC
- Acorduri parteneriat
- Administrativ
- Deconturi 2014
- Documente INFRASOFT
- File transfer
- HowTo-Documenta.ro
- HR
- Oferte
- PR
- Proiecte
- Proiecte in pregatire
- Public
- Registratura
- Sales
- Scan
- Terti
- Users

**Documente**

	Nume	Versiune	Blocat de	Categorie	Creat de	Creat la	Modificat de	Modificat la
<input type="checkbox"/>	Serviciul Clienti SEMA PARC.doc	1			i.adriana	01.04.2014		
<input type="checkbox"/>	Situatie tichete de masa - 1.04.2014.xlsx	1			i.dana	01.04.2014		
<input type="checkbox"/>	Imputernicire model.docx	1			i.dana	01.04.2014		
<input type="checkbox"/>	Proces verbal predare - primire cartela acces.docx	1			i.dana	31.03.2014		

Proprietati  
Index text  
Versiuni

# Functionalitati de baza

- **Organigrama** – definirea organigramei pe departamente, asocierea utilizatorilor la organigrama. Utilizarea acesteia in definirea fluxurilor de documente

The screenshot displays the 'Documenta' web application interface. The top navigation bar includes 'Consola', 'Inbox', 'Index', 'Administrare', 'Rapoarte', 'Registratura', and 'Favorite'. The user is logged in as 'Admin ELPRECO@ELPRECO'. The main menu on the left shows the 'Organigrama' section, with a tree view under 'Director general' including 'Administratie', 'Aprovizionare (D)', 'Contabilitate (D)', 'Juridic', 'QHSE', 'Resurse Umane', 'Secretariat', 'Transporturi (D)', 'Casa ELPRECO', 'Elpreco Infrastructura', and 'Vanzari'. The central 'Adauga persoana' form contains the following fields:

Nume:	<input type="text"/>	Tip act:	<input type="text"/>
Prenume:	<input type="text"/>	Serie act:	<input type="text"/>
Functie:	<input type="text"/>	Nr. act:	<input type="text"/>
CNP:	<input type="text"/>	Nr. ore:	<input type="text"/>
Email:	<input type="text"/>	Nr. permis conducere:	<input type="text"/>
Telefon:	<input type="text"/>	Marca:	<input type="text"/>
Data in:	<input type="text"/>	Data ex psiho:	<input type="text"/>
Data Out:	<input type="text"/>	Data ex medical:	<input type="text"/>
Data nasterii:	<input type="text"/>	Activ:	<input checked="" type="checkbox"/>

Buttons for 'Ok' and 'Cancel' are located at the bottom right of the form.

# Functionalitati de baza

- Modele documente – permite crearea de documente din sablon prin introducerea doar a metadatelor

The screenshot displays the Documenta DMS web interface. The top navigation bar includes the logo 'Documenta Infrastructure Business' and a user login 'Inregistrat ca: Admin ELPRECO@ELPRECO'. Below the navigation bar, there are tabs for 'Consola', 'Inbox', 'Index', 'Administrare', 'Rapoarte', 'Registratura', and 'Favorite'. The main content area is titled 'SITE > \$MODELDOC > HR' and is divided into two main sections: 'Structura' (left sidebar) and 'Documente' (main table).

The 'Structura' sidebar shows a tree view of folders, with 'HR' selected. The 'Documente' section contains a table of document templates. The table has columns for document name, count, title, organization, creation date, user, and expiration date. The table data is as follows:

Document Name	Count	Title	Organization	Creation Date	User	Expiration Date
Formular evaluare - executant.doc	1	Formular evaluare post	ELPRECO	04.11.2013	elpreco	12.02.2014
Formular evaluare agent VANZARI.doc	1	Formular evaluare post	ELPRECO	04.11.2013	elpreco	17.02.2014
Fisa de post.pdf	1	Fisa de post	ELPRECO	04.11.2013	elpreco	17.02.2014
Cerere pensionare la limita de varsta.doc	4	Cerere pensionare la limita de varsta	ELPRECO	04.11.2013	elpreco	08.04.2014
Cerere indemnizatie pensionare - prima.docx	3	Cerere indemnizatie pensionare - prima	ELPRECO	04.11.2013	elpreco	08.04.2014

At the bottom of the table, there is a pagination control showing 'Afisare 31 - 40 Din 41 (5 Pagini)'. The footer of the interface reads 'Documenta DMS © 2013 All Rights Reserved.'.



# Funcionalitati de baza

- Modele documente – exemplu: completarea unei fise de post

The screenshot displays the Documenta DMS interface. A modal dialog titled "Proprietati" is open, showing the "Attribute" tab for a document named "Fisa de post-159973.pdf". The dialog contains several input fields for document metadata:

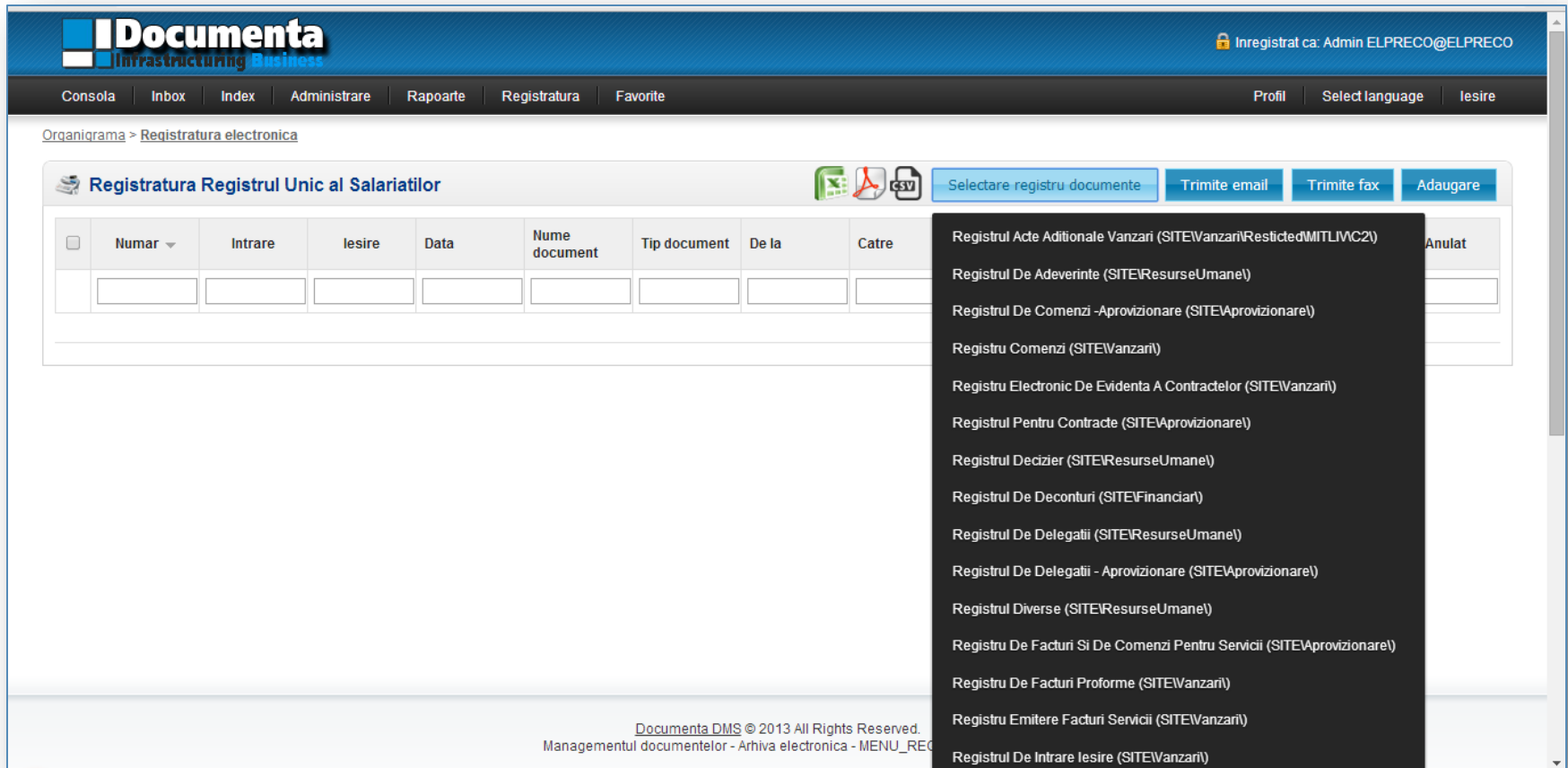
- Denumire post:** An empty text box.
- Pozitie in COR:** An empty text box.
- Sectie:** An empty text box with a trash icon and a close icon.
- Atelier:** An empty text box with a trash icon and a close icon.
- Nivel in firma:** An empty text box with a trash icon and a close icon.
- Elaborat de:** A text box containing "ADMIN ELPRECO" with a trash icon and a close icon.
- Titular post:** An empty text box with a trash icon and a close icon.

At the bottom of the dialog are three buttons: "Salveaza", "Actualizare", and "Anulare".

The background interface shows a file tree on the left with "HR" selected, and a document list on the right with columns for date, user, and another date. The user is logged in as "Admin ELPRECO@ELPRECO".

# Functionalitati de baza

- Registratura electronica – posibilitatea de a tine evidenta pe mai multe registre



The screenshot displays the Documenta DMS web application interface. The header includes the logo 'Documenta Infrastructure for Business' and the user 'Admin ELPRECO@ELPRECO'. The navigation menu contains 'Consola', 'Inbox', 'Index', 'Administrare', 'Rapoarte', 'Registratura', and 'Favorite'. The main content area is titled 'Registratura Registrul Unic al Salariatilor' and features a table with columns: 'Numar', 'Intrare', 'Iesire', 'Data', 'Nume document', 'Tip document', 'De la', and 'Catre'. A dropdown menu is open, listing various document types such as 'Registrul Acte Aditionale Vanzari', 'Registrul De Adeverinte', 'Registrul De Comenzi -Aprovizionare', and 'Registrul De Comenzi'. The footer contains the text: 'Documenta DMS © 2013 All Rights Reserved. Managementul documentelor - Arhiva electronica - MENU\_REC'.

# Functionalitati de baza

- Registratura electronica – registru de contracte

**IDocumenta**  
Infrastructuring Business

Inregistrat ca: Barcutean Lilia@INFRA

Consola | Inbox | Index | Administrare | Rapoarte | Registratura | Activitati | Favorite | Profil | Select language | Iesire

Registratura electronica

Registratura Registru contracte

Selectare registru documente | Trimite email | Trimite fax | Adaugare

<input type="checkbox"/>	Numar	Intrare	Iesire	Data	Nume document	Tip document	De la	Catre	Numar emitent	Data emitent	Inregistrat de	Inregistrat la	Anulat
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>										
<input type="checkbox"/>	84	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10.04.2014				Adriana Plaiasu		31.03.2014	i.lilia	10.04.2014	<input type="checkbox"/>
<input type="checkbox"/>	83	<input type="checkbox"/>	<input checked="" type="checkbox"/>	09.04.2014	Contract de comodat Infracsoft_EPS Corporation Sucursala Bucuresti_31 martie 2014.pdf			EPS		31.03.2014	i.lilia	09.04.2014	<input type="checkbox"/>
<input type="checkbox"/>	82	<input type="checkbox"/>	<input checked="" type="checkbox"/>	09.04.2014	Contract de comodat Infracsoft_EPS Romania_31 martie 2014.pdf					31.03.2014	i.lilia	09.04.2014	<input type="checkbox"/>
<input type="checkbox"/>	81	<input type="checkbox"/>	<input checked="" type="checkbox"/>	08.04.2014				Web Total Platform		31.03.2014	i.lilia	08.04.2014	<input type="checkbox"/>
<input type="checkbox"/>	80	<input type="checkbox"/>	<input checked="" type="checkbox"/>	01.04.2014				Bianca Culea PFA		24.03.2014	i.lilia	01.04.2014	<input type="checkbox"/>
<input type="checkbox"/>	79	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11.02.2014			Barcutean Adrian			01.11.2013	i.lilia	11.02.2014	<input type="checkbox"/>
<input type="checkbox"/>	78	<input type="checkbox"/>	<input checked="" type="checkbox"/>	27.11.2013	Comanda 1doc.doc			ETA2U			i.adi	27.11.2013	<input type="checkbox"/>

# Functionalitati de baza

- Rapoarte de management – permite definirea mai multor tipuri de rapoarte necesare pentru evaluarea activitatii de catre management

The screenshot displays the 'Rapoarte' (Reports) management interface in the Documenta application. The header shows the 'Documenta' logo and the user 'Admin ELPRECO@ELPRECO'. The navigation menu includes 'Consola', 'Inbox', 'Index', 'Administrare', 'Rapoarte', 'Registratura', and 'Favorite'. The main content area features a 'Rapoarte' section with a toolbar containing icons for Dashboard, BI Coloane raport, Drepturi, Configurare Dashboard, Adaugare, and Sterge. Below the toolbar is a table with the following columns: Actiune, Nume, Modul, Activ, Categorie, Parametri document, Pozitie, and Rapoarte pe pagina. The table contains three rows of report configurations.

Actiune	Nume	Modul	Activ	Categorie	Parametri document	Pozitie	Rapoarte pe pagina
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> [Editare]	Raport instrument plata	ELPRECO	<input checked="" type="checkbox"/>		DELA_PANALA	0	
<input type="checkbox"/> [Editare]	Raport CO Individual	ELPRECO	<input checked="" type="checkbox"/>		DELA_PANALA_PERS	0	
<input type="checkbox"/> [Editare]	Raport CO	ELPRECO	<input checked="" type="checkbox"/>		DELA_PANALA	0	

# Functionalitati de baza

- Rulare rapoarte – exemplu: rapoarte cereri de concediu

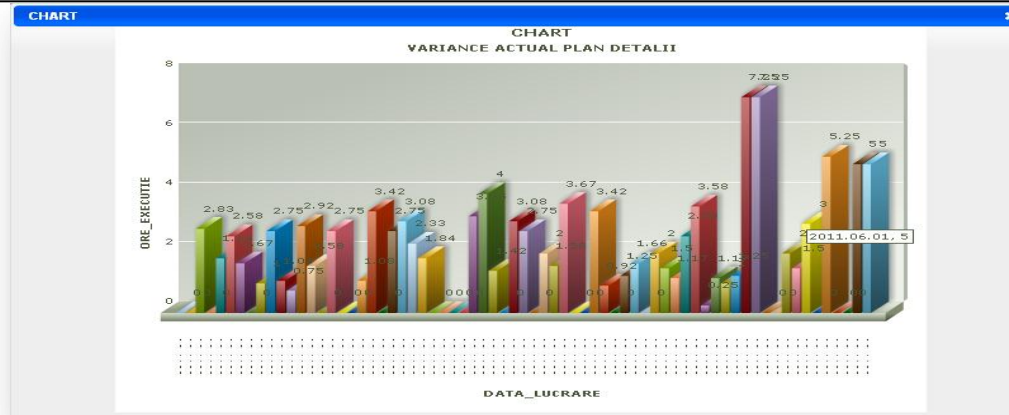
Situatie concediu de odihna

Pana la 09.05.2014; De la 01.01.2014

Back

Raport CO

Fisier	Nume	De la	Pana la	Nr zile	Tip concediu	Funcctie
Cerere concediu Zimbran Radu 13.02.2014.docx	Zimbran Radu	13.02.2014	15.02.2014	2	Concediu de odihna lichidare	Inginer Dep. Achizitii
Cerere concediu Matei Alexandru 06.02.2014.docx	Matei Alexandru	06.02.2014	14.02.2014	7	Concediu de odihna lichidare	Inginer chimist



# Alte functionalitati

- Scanarea , incarcarea si arhivarea documentelor
- Extragerea de Metadate
- Indexarea documentelor => Cautare flexibila si facila
- Organizare pe foldere a documentelor
- Cautare FULL-TEXT
- Administrarea utilizatorilor folosind grupuri, roluri si drepturi de access (read, write, full control, recursiv)
- **Completarea automata a documentelor** in format Word cu date din METADATE-le documentului – asigurarea conformitatii cu Standardele ISO & others, complianta cu procedurile interne ale organizatiei, ROI



# Alte functionalitati

- **Exportul rapoartelor** in Excel, PDF, doc, html;
- **Import** automat de date din Excel
- **Audit-ul** accesului de documente
- **Indexarea si cautarea documentelor** – documentele sunt indexate dupa tip, denumire si metadate. Cautarea si regasirea se efectueaza dupa criterii multiple de cautare. Regasirea documentelor este rapida –Suport ISO – alte Certificari – sistemul expune mecanismele necesare de control al documentelor si al inregistrarilor in conformitate cu standardele ISO in vigoare.
- **Integrare cu EMAIL** – MsOutlook, Microsoft Word, Microsoft Excel, Powerpoint, MsProject, MsVisio
- **Arhivarea automata a documentelor.** Recuperarea documentelor sterse din greseala



# Compliance Management

- Asigurarea conformitatii operatiunilor unitatii dumneavoastra cu:
  - Legislatia din Romania
  - Legislatia UE
  - Normele interne – regulamentele interne de functionare, procedurile interne de lucru
  - Standardele de referinta – ISO si alte standarde specifice activitatii dumneavoastra
- Semnatura electronica – notificari privind receptia documentelor de catre personal
- Formulare si teste online privind insusirea cunostintelor in conformitate cu fisele de post





# Tehnologie

- Import automat din Excel si web-services
- Export Excel, PDF; Posibilitatea de transmitere date pe web-service catre parteneri (B2B)
- Tehnologie de top: ORACLE & Java
- Accesibilitate de pe telefonul mobil
- Integrare cu Active Directory
- ORACLE Database
- JAVA Application Server
- Compatibilitate cu toate sistemele de operare



# Programul National DMS

*Pentru inscrierea in program va rugam sa ne trimiteti un email la adresa [programulnationalDMS@infrasoft.ro](mailto:programulnationalDMS@infrasoft.ro) prin care sa solicitati inscrierea si activarea unui cont demo gratuit.*

*Pentru inscrierea la un workshop gratuit ne puteti contacta pe baza informatiilor de mai jos:*

- Mobile: +4 0755.058.080
- Phone/FAX: +4 021.336.336.8
- Email: [lilia@infrasoft.ro](mailto:lilia@infrasoft.ro)
- Skype: [lilia.cozari](https://www.skype.com/name/lilia.cozari)
- Web: [www.infrasoft.ro](http://www.infrasoft.ro) ; [www.managementul-documentelor-romania.ro](http://www.managementul-documentelor-romania.ro)

