

IN 2 MINUTES

Organising and archiving documents in digital format (purpose, advantages, steps on how to structure)

Lack of time is a question that is always present when we talk about productivity.
But what if we optimised our time?

How?

Organising and **archiving documents digitally**. Don't believe me?

It's a concept that is increasingly present in companies' day-to-day lives, from receiving an email to issuing an invoice.
The aim of adopting digital archiving is not only to eliminate the use of paper, but also to optimise **processes**.

The advantages?

Are immense!

As well as facilitating the storage of digital documents, the digital archive efficiently simplifies the process of consulting and sharing all information at any time and from anywhere, allowing quick access to documents.

- Can you imagine standing on a terrace and visualising that document you urgently need to have?

The digital archive fulfils this need!

Amongst many other advantages is the reduction in *office material costs* (paper, ink cartridges, etc.), thus also helping to **reduce your company's costs** and ecological footprint.

João, one of our clients, recently changed his mind and now feels the need to have digital archiving implemented in his company!
He asked us what the steps would be to start implementing the digital organisation of documents.

The organisation is structured in such a way as to create levels, so that it is easy to search through folders and sub-folders, just as it was in the physical dossier archive.

This is how we introduced you to the most important stages of the **process**:



DIGITALISATION

Convert paper documents into digital format using a scanner to obtain legible digital copies. Apps for mobile phones: Adobe Scan, Microsoft Lens, etc...



CATEGORISATION

Classify documents into categories, such as Assets, Human Resources, Accounting, etc...



NAME THE DOCUMENT

Use a clear and consistent nomenclature for files to make them easier to locate. Avoid using spaces/accents/cedillas/special characters. Abbreviate words to avoid reaching the character limit of the file path.



REGULAR BACKUPS AND SECURITY

It is extremely important to make backup copies of your digital documents in secure locations and to use strong passwords to protect your files.

João: In the end, does this new filing process give me more time to focus on my business?

We put John's mind at rest by showing him the "machine" at work.

Well, the process starts with digitising the documents. We advised João to request the invoices in PDF format from the root, in this case from the suppliers, to his email or any other means of communication of his choice.

Nowadays, the issuing of invoices in electronic format is universal and it is at the source that we must impose ourselves!

Join us now for the most recent situation that happened to João, a few months after starting the Digital Archive process in his company.

João, a property consultant, was on holiday with his friend and professional colleague, António, when a potential client called him to negotiate a property they had both visited. João promptly accessed his digital archive on his mobile phone, viewed the proposal he had been given earlier and sent the forms needed to formalise his business.

António was also contacted by a client to send him the plans for a property that he had on paper in his office, but as he hadn't adopted digital archiving, he was unable to fulfil the client's request to execute the deal.

What about your company? Have you adopted the Digital Archive?

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