STATION 6

SKILLS4VETAPP

UPSKILLING VET TRAINERS TO ACT AS APPRENTICES COACHES

Documentation Goes Digital

by UNIVERSITÀ DELLE LIBERETÀ

PROJECT NUMBER: 2022-1EL01-KA220-VET-000088384

Co-funded by the European Union

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Introduction

The European Union aims to empower businesses and citizens in a digital future that is people-centred, sustainable and more prosperous. Indeed:

- The Digital Agenda for Europe (EUR-Lex - 52010DC0245 - EN - EUR-Lex (europa.eu) of 2010 emphasised that ICT is at the heart of the EU's objectives.

- In 2015, the Strategy for a Digital Single Market in Europe (https://eur-lex.europa.eu/legal-content/IT/TXT/?uri=celex:52015DC019) aimed to ensure better access to digital goods and services across Europe, to promote optimal conditions for digital networks and services and to amplify the growth potential of the digital economy.

- The 2020 Strategy for Shaping Europe's Digital Future (EUR-Lex-52020DC0067 - EN -EUR-Lex -europa.eu) focused on technologies that benefit people, foster a competitive economy and support an open and democratic society.

- The Digital Compass (EUR-Lex - 52021DC0118 - EN - EUR-Lex - europa.eu) of 2021 defined the EU's digital goals for 2030 in the areas of skills, government, business and infrastructure.

-The EU AI Act, which will come into force after final approval (end of 2024 - beginning of 2025), aims to create a safe and transparent environment that promotes innovation, but at the same time protects the fundamental rights and security of citizens.

Let's begin...

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Section 1: Transition to digital documentation

Digital document management is much more than a system that allows sheets and folders to be filed electronically: it is first and foremost a methodology, an approach to work, with respect to which digital technologies represent only one - albeit fundamental - element of a transformation that the company must address above all at a cultural and organisational level. True digitisation passes through the re-engineering of how documents are generated, shared, modified, approved and stored in accordance with current regulations. It is therefore an evolution that is not limited to reducing or eliminating the use of paper, but that requires the introduction of specific platforms and practices that are deeply integrated with all levels of the corporate structure. A strategy that can be defined as complete in this sense, in fact, must also extend to the touch points that put the company in contact with its interlocutors, standardising the user experience not only between different teams but also between different organisations, creating a shared digital environment that is homogenous, secure and monitorable.

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Main Body

Basic Principles

Converting paper documents to digital is a simple but not trivial operation. First of all, you have to make sure that you keep a document in your company that has the same value as the original. On the other hand, when undertaking the digitisation work, it is very useful to approach it with a more general point of view rather than carrying it out only for the purpose of eliminating traditional archives. While setting up the dematerialisation work, it is worth analysing the document.
processes that are being worked on anyway and using the opportunity to make them more effective.
To dematerialise paper-based knowledge assets in a broader strategic context it is necessary to carry out:
1. Analysis of the current state of document procedures and individual documents existing in the company.
The first step to start the path of document digitisation is the study of how many documents circulate in the company and which ones are most critical.
2. Choice of document solution
When faced with the choice of a document solution, it is essential to opt for a system that is comprehensive, flexible, scalable and adaptable to changing business needs. It is advisable to turn to a specialised and referenced software partner with a solid background of experience in various industries.

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3. Planning the operation of new digital processes

Based on the identification of needs, new document workflows can be outlined to cope with them and resolve any inefficiencies.

4. The acquisition of paper material by the document system

During the acquisition phase of the paper material, the document management system engages not only in the transformation of physical documents into digital format, but also in the optimisation of the entire archive.

This process includes the elimination of duplicates and superfluous documents, ensuring that each file is correctly logged and filed.

5. Organisation of Files by Files

On the basis of their content and their role within a certain activity, each dematerialised document can be placed in proper digital files that group everything needed to perform a task.

6. Arranging for the Use of Electronic Signatures

The use of electronic signatures is essential in order not to have to revert to the paper form of the document again. The adoption of electronic signatures within corporate document management is a fundamental development to improve operational efficiency and information security.

7. Document archiving

Once indexed, correctly addressed and organised, documents and files must be stored in such a way as to guarantee their authenticity and traceability over time.

8. Privacy and data security policy

With regard to document management, the importance of data protection and the safeguarding of sensitive data in accordance with regulations must always be borne in mind.

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Why digitise documents - the benefits of digitization
https://www.adobe.com/acrobat/hub/10-benefits-of-digitizing-documents.html
This texts explains the benefits of digitalisation

VIDEO
How to make Electronic Signature
https://www.youtube.com/watch?v=dwqg52dlbvc
The video shows how to realise electronic signatures

Duration: 16:09 minutes
language: English

✦ Conclusion

In the digital era in which we live, digital transformation has become a priority for many companies and one of the crucial aspects of this transformation is document digitisation. Indeed, the digitisation of documents makes it possible to break free from the dependence on paper documents and move towards a more efficient and organised working environment. Digital documents can be easily searched, shared and edited, reducing the time spent on document management and allowing employees to focus on more value-added tasks.

Digitising documents also eliminates or significantly reduces the need for physical storage space for paper documents. This leads to savings in storage costs and a reduction in wasted resources. In addition, reducing the consumption of paper and other materials associated with managing paper documents can contribute to a company's environmental sustainability efforts.

The digitisation of documents is also particularly important for the vocational training sector for a number of reasons, affecting both operational efficiency and the training experience itself, as it not only improves efficiency, flexibility and security, but also enables a better response to the needs of an ever-changing labour market. Indeed, the world of training is changing rapidly, with new technologies, techniques and regulations being updated frequently. Digitisation makes it easier to update materials and documents in real time, ensuring that training content is always aligned with the latest standards, while also facilitating sharing and collaboration between students and trainers.

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Section 2: Tools and platforms for digital documentation

Electronic document management means adopting a work organisation process that minimises the use of paper and is complemented by a digital document archiving solution.
Software is therefore useful, offering a series of interesting opportunities that have concrete positive effects on the organisation's productivity, in addition to savings in economic resources and time.

Thanks to increasingly sophisticated tools and increasingly 'intelligent' software, data entry work can now be fully automated. Structured documents acquired through various channels (mail, fax, e-mail...) can be converted into data to feed the company database without any effort or investment in human resources
Document capture platforms fit into business processes bringing significant benefits.

The revision of the regulation, EU No. 910/2014 - eIDAS initiated by the European Commission in 2021, includes among its objectives the introduction of dedicated indications for the retention function largely ignored in the regulation still in force.

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Among the reasons for the turnaround, the Commission itself emphasises the need to respond to market dynamics and the widespread diffusion of technological solutions for the mass production and use of electronic documents, but also the observation that some member states have adopted specific regulations precisely in this area over the last decade, promoting the emergence of qualified trust services for the long-term archiving and management of electronic signatures and seals.

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Main Body

Avoiding the use of physical media as much as possible allows a series of savings in economic resources (from the paper itself to storage space) and in the time that employees inevitably have to spend organising folders and placing them, then searching for them and putting them away again.

Gaining this time that can be used for more value-added activities is the first productivity benefit that companies can experience by using technology to optimise document processes, but it is interesting to focus on all the more or less obvious benefits generated, in particular, by digital document storage.

Software offers a number of interesting opportunities that have concrete positive effects on the organisation's productivity in addition to the savings mentioned above.

1. Easey and immediacy of sharing, a digital archive promotes collaboration. The ease of transmission is, in fact, evident in the very concept of digital, which sets no geographical, temporal or other limits. And this of course also and especially applies to mobile working.

2.Richer in content, an IT document can be accompanied by graphics, audio, video that help disseminate corporate know-how, making information more usable.

3.Control of access and changes made to documents: with advanced software applications it will be much faster, and therefore less costly for organisations, to be able to identify who does what, when and why, on each document held by the company.

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4.Support in being compliant with data privacy rules, the company that uses software for digital archiving of documents will be guided in the preparation of compliant solutions resulting in faster and more effective definition of templates, roles and responsibilities.
5.Increasing overall efficiency, in general, doing document management allows monitoring the progress of activities, identifying bottlenecks and so on. In other words, the data collected by software systems are invaluable for corporate decision-makers who can intervene with process improvements aimed at ultimately increasing productivity, traceability and transparency.

Software solutions designed to digitise, collect, process and store physical or digital documents in an automated manner are digital document capture platforms. These platforms use technologies such as optical scanning, optical character recognition (OCR) and other advanced tools to convert paper documents, images or files into digital format, making them searchable, manageable and usable within a corporate information system. These platforms do not bring abstract benefits, but measurable performance improvements in economic terms.

The 4 advantages of introducing a document capture platform in the company are:

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1. **Reduction of processing costs** - Thanks to automatic data capture software, companies can extract from structured documents only the data of interest for feeding the company database.
2. **Increased transactional speed** - The speed of data extraction from paper and electronic documents, without operator intervention, makes the data collection function highly efficient.
3. I**mproved productivity** - The automation of document processing processes enabled by the automatic document capture and classification platform makes it possible to reallocate human resources once employed in these processes to more productive activities.
4. **Improvement of data utilisation** - Paper, fax, PDF, e-mail attachments: thanks to the data they contain acquired through a multi-channel capture platform, documents (whether analogue or digital) acquire new value for the company's efficiency, for its business intelligence and for customer service.

Customer Relationship Management (**CRM**) platforms, software designed to manage the relationships and interactions between a company and its current and potential customers, can also offer significant support to **document digitisation** by integrating digital information management with day-to-day sales, marketing and customer service operations.

Some aspects of the platform that facilitate and enhance digitisation:

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1. **Centralised document storage** - All relevant customer-related documents such as contracts, invoices, quotes, orders and correspondence are stored in a single platform, reducing the need for paper archives or separate management systems.

2. **Document management and tracking** - Many CRMs allow the entire lifecycle of a document to be tracked and monitored, thus offering greater control over documents, ensuring that processes are followed correctly and that documents are not lost or forgotten.

3. A**dvanced document search and accessibility** - with this functionality, scanned documents are easily searchable and accessible from any connected device, greatly speeding up access to information and improving operational efficiency.

4. **Monitoring and regulatory compliance** - Digitising documents through digitisation makes it easier for companies to maintain regulatory compliance. CRMs can generate document change logs, provide audit trails and ensure that processes are carried out in compliance with regulations, such as electronic signature management or data protection.

5. **Reduced paper use and sustainability** - The integration of document management into a CRM supports many companies' goal of becoming more sustainable.

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TOP 10 SOFTWARE DOCUMENTATION TOOLS
https://www.geeksforgeeks.org/top-10-free-software-documentation-tools/

Software documentation tools are software applications or services that help developers and technical writers create, manage, and publish software documentation.
Language: English

✦ Conclusion

The use of software and platforms for the digitisation of documents aims to make operations agile, reduce manual steps, guarantee control and transparency over the execution of each activity, while enabling the collection of a series of data that can then be correlated and analysed to evaluate the efficiency of processes.

The platform facilitates the cross-referencing and correlation of information and data from different sources, making it more accessible and comprehensible to users, or access to different applications from a single interface.

Rethinking and redesigning all business processes using the automation modules of modern technology platforms: this, in a nutshell, is what 'corporate digitisation' means.

The goal is to make operations agile, reduce manual steps, ensure **control and transparency** over the execution of each activity, while enabling the **collection of a range of data** that can then be correlated and analysed to assess the efficiency of processes.

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External resources for further exploration

Document Management System – A Way to Digital Transformation, Sandra Jordana, Simona Sternad Zabukovšekb, Irena Šišovska Klančnik University of Maribor - June 2022, https://intapi.sciendo.com/pdf/10.2478/ngoe-2022-0010 publication Sciendo

WP-Digital-Transformation-Challenges https://7270841.fs1.hubspotusercontent-na1.net/hubfs/7270841/Papers/WP-Digital-Transformation-Challenges.pdf publication Identec Solution

Dalla conservazione a norma dei documenti informatici all'IA: così Archiva Group aiuta le aziende a evolvere il loro modello di business - May 2023 https://forbes.it/2023/05/22/dalla-conservazione-a-norma-dei-documenti-informatici-allia-cosi-archiva-group-aiuta-le-aziende-a-evolvere-il-loro-modello-di-business/ Article Forbes

Three Questions to Ask About Your Digital Strategy - July 2024 https://sloanreview.mit.edu/article/three-questions-to-ask-about-your-digital-strategy/MIT Sloan Management review

Sono entrate in vigore le nuove norme europee sulla sicurezza e la trasparenza delle aziende digitali - August 2023 https://www.ilpost.it/2023/08/25/norme-europee-sicurezza-trasparenza-piattaforme-digitali Article il POST

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