

SETTING UP AN ELECTRONIC FILING & STORAGE SYSTEM



NATIONAL RESTAURANT ASSOCIATION

ServSafe
National Restaurant Association

THE BENEFITS OF DIGITAL FILE MANAGEMENT

Most suppliers will be able to maintain traceability information for your restaurant. If a supplier cannot do this or you want to keep these records yourself, this document shows the steps a restaurant can take to go from a paper-based invoice/receipt filing storage system to an electronic filing storage system. Creating an electronic filing storage system is beneficial because it does all of the following:

- Creates receipt records to verify that orders from suppliers are delivered in the right quantities, in good conditions, and at the proper time.
- This results in reduction in costs, improved management knowledge, and enhanced data collection.
- Allows everyone in management to see what was ordered/versus what was received and have photo evidence of any discrepancies or damaged products.
- In addition, eliminates paper record storage and makes it easier to find the document you need.
- Allows for better inventory management, compliance with the FDA's Traceability Rule
- Improved fulfillment of customer orders.

STEP 1

DOWNLOAD A DIGITIZING APP

Download an app or purchase software that can digitize paper documents/photos into searchable PDFs and has labels/name tags that you can customize for your operation. The digitizing app we used for Guzzle's Grill Traceability Plan is called ABBYY Fine Reader PDF*

STEP 2

ELECTRONIC DATA STORAGE

Get a cloud data storage app/software or use your current secure electronic data file storage system. In Guzzle's Grill Traceability Plan, we used *Google Drive.

STEP 3

SET UP FILE FOLDERS

Set up electronic folders with supplier names to store traceability documents that include KDE information.

Example:

- 📁 Guzzle Grill Traceability Information
 - 📁 Felicia's Frozen Shrimp
 - 📁 Freshland Farms
 - 📁 Lots Of Nuts

STEP 4

SCAN/PHOTOGRAPH PAPER DOCUMENTS

Take photos/scan documents using the app. Convert the image into a "Scannable PDF" or your preferred format. Then click "details" to create and add labels/tags with the FTL Food(s) and supplier name(s) to the image file(s)

STEP 5

PUT THE FILE IN AN ELECTRONIC FOLDER

Upload the image/file into the correct supplier file folder in the electronic storage system.

STEP 6

CREATE A FOLDER FOR REGULATOR ACCESS

When a regulator requests traceability information, create a folder that can be shared/sent to the regulator. Complete a search on FTL food and/or supplier name. It will pull all those files. Send a copy of these files to the folder for the regulator.

STEP 7

DELETE FILES OLDER THAN 2 YEARS

**DISCLAIMER: There are many commercial providers that offer software that can digitize, label, and store paper documents electronically. For this fictional example, we used easy to use and affordable software offered by ABBYY and Google.*