

"Take Control of Your Paperless Office" takecontrolbooks.com

Summary of ebook "Take Control of Your Paperless
Office"

-Jean Poland-

Paperless Office Preliminary Steps

- **Digitize and dispose of most incoming paper:**
- Important tool - Document Scanner.
- Features you need in Mac software to accompany your scanner - OCR Software.
- Set up your software for optimal efficiency and quality.
- Create a Workflow for Incoming Paper.
- Create a plan to scan all those paper documents already in your files.
- Capture digital copies of documents even when you're away from your scanner.

Benefits of Ditching Paper

- Moving from paper to digital:
 - • **Reduce clutter.**
 - piles of papers
 - haphazard filing systems
- **Save time and effort.**
 - Filing a single document may take just seconds, but the endless process of filing, searching for, retrieving, and replacing papers.
 - You'll still file digital documents, but searching will take far less time and be less error-prone, plus there's nothing to put back when you're done.

Benefits of Ditching Paper cont.

- **Save money.**
 - Save on paper, printers, ink or toner cartridges, envelopes, file folders, filing cabinets, extra office space to hold all the filing cabinets.
- **Search everything**
 - Electronic search documents you've received in the mail.
- **Share documents easily.**
 - Printing or photocopying documents and then handing them or mailing them to others. Why shouldn't that ease extend to paper documents?

Benefits of Ditching Paper cont.

- **Back up physical documents.**
 - What if your tax returns, insurance records and other crucial paper files were lost in a fire or other disaster?
 - Create digital versions and you can back them up and have remote access to all your documents.
- **Save the planet**
 - Reduce paper consumption

Understand Searchable PDFs

- When you scan documents, your scanning software will probably save PDF Image Only files initially.
- The second process is character recognition (OCR), which identifies letters and words in the image.

Consider Storage Options

- If your paper files are in a filing cabinet they will not spontaneously evaporate, or lose part of their contents, due to a filing cabinet malfunction.
- Digital files typically live on a hard disk somewhere and hard disks, by their very nature, are subject to some problems.
- Where and how you'll store the digital files themselves and the physical media they rely on.
- Three main factors to consider: disk capacity, local versus cloud storage, and media longevity.

Consider Storage Options

- **Disk Capacity**
- You need room to expand.
- Consider supplementing with an external drive.
- It's worth paying a bit extra for a drive with a longer warranty—5 years.

Local vs. Cloud Storage

- Data storage in the “cloud” at reasonable rates—perhaps less per year than what it would cost you to buy a new hard drive. The advantages of cloud storage for your formerly paper documents are many—for example:
 - **Space savings.** Hard drives take up space in your office
 - **Accessibility.** With cloud-based storage, you can access your data from any computer in the world with an Internet connection.

Local vs. Cloud Storage cont.

- • **Redundancy.** Cloud storage providers generally have automated backups to protect your data against drive failures and user error. When used in conjunction with local storage, cloud storage gives you a second, offsite copy of your data that provides extra insurance against hardware and software gremlins. (Cloud storage as such isn't necessarily the same as online backup.)
- • **Maintenance.**
 - If a hard drive in your office dies or runs out of space, you have to buy a new one and copy your data from a backup—a lengthy and tedious process.
 - Cloud storage providers have systems in place to keep their equipment up to date and in good working order.
- The biggest downside to cloud storage is that it's *much* slower to copy data to or from the cloud than to store it locally.

Local vs. Cloud Storage cont.

- Examples:
- **Dropbox:**
 - 2 GB of data for free; 50 GB of storage costs \$9.99 per month (<https://www.dropbox.com/>).
- **Google Docs:** 1 GB of storage free (although individual files must be no larger than 250 MB); additional storage is \$0.25 per gigabyte per year (<http://docs.google.com/>).
- **MobileMe:** Apple's \$99-per-year for 20 GB of storage shared between iDisk and email (<http://www.apple.com/mobileme/>).
- **SugarSync:** This service lets you sync files and folders across Macs, Windows PCs, and a variety of mobile gadgets. You share and sync files with other people. Plans start at \$4.99 per month or \$49.99 per year for 30 GB of storage; a free 30-day trial is available (<http://www.sugarsync.com/>).
- **Syncplicity:** In much the same as SugarSync, Syncplicity lets you sync your data up to the cloud, and down to other Macs and Windows PCs. Syncplicity gives you 2 GB of storage (and access from two computers) free. A Personal Edition plan that costs \$15 per month gives you 50 GB of storage and the capability to sync five computers. (<http://www.syncplicity.com/>).

Head Off Paper before It Reaches You

- Begin the process of selecting, setting up, and using a scanner to digitize your papers.
 - Once that's done, you'll be able to dispose of the originals so they no longer clutter your office.
 - **Wouldn't it be better if the paper never reached you?**

Head Off Paper before It Reaches You cont.

- **Sign Up for Paperless Billing**

- Most banks, insurance companies, utilities, phone companies, periodicals, and other entities that expect money from you on a recurring basis offer some form of paperless billing and payment.
- Generally you can get a PDF copy of my statement. Then file it on your computer. The convenience of paying in a few clicks.

Head Off Paper before It Reaches You

cont.

- **Is your email under control?** If not you are likely to miss emailed payment notices.
- **Do you have a fallback plan?**
- An emailed payment notice isn't much good if you're away from your email for a long time.
 - **Tip:** If you set up a special email address that you use only and always for bills, and make sure both you and another person check that account regularly, you're less likely to miss billing notices.

Head Off Paper before It Reaches You cont.

- **Do you monitor balances and schedules carefully?**
 - Check your bank balances several times per week, to —Check your bank balances and charge card balances several times per week
 - Have alerts in my calendar reminding me about upcoming payments, so you can be certain there's enough money in the right accounts to pay bills when they come due.
 - If you use paperless billing download your statements. Your payee probably offers PDF copies of your statements. Be sure you keep local copies, and that you download them as soon as they're available.

Head Off Paper before It Reaches You cont.

- **Other Electronic Payment Options**

- What if a payee doesn't offer a paperless option?

- **PayPal**

- **Online bill payment:** Many banks let you electronically request that a payment of an arbitrary amount be made to a given person and address. The bank or payment processor deducts the money from your checking account, prints out a check, and mails it to the payee and never have to deal with the paper yourself.

- **Wire transfers:** For recurring payments, especially for larger amounts like rent, your bank may be able to set up a repeating wire transfer direct to the payee's account.



Head Off Paper before It Reaches You

cont.

- **Choose Online Bank Statements**
- Just as you can usually receive and pay bills electronically, you can usually do the same with monthly bank statements. Most banks and credit unions let you download your statements as PDF files.

Create a Workflow for Incoming Paper

- **Create a Physical Paper Path**

- Acquire at least two boxes, it can be an actual box, a plastic or metal tray, a wall-mounted paper holder, a file folder, or a taped-off corner of your desk.
- You'll work your way through each item in that tray—reading it and then doing whatever is required, whether that's writing a reply, filing it, making a phone call, or something else.
- Replies to incoming mail, along with new mail you generate from scratch, go into the Out box.
- Print to PDF when possible for email etc. when possible.

Create a Workflow for Incoming Paper cont.

- **In Boxes**

- Suppose you have an In box that you've designated solely for papers that will need to be scanned, and an Out box that's solely for papers that have already been scanned. Your setup looks like this: In - Scanner - Out
- Complex needs may require some refinement. Your set looks like this Unopened, Urgent , Whenever - Scanner - Out

Create a Workflow for Incoming Paper cont.

- **Out Boxes**

- Maybe a simple Out box won't cut it for you, because some of the things that go there have to be mailed right away, while others can be filed, shredded, recycled.
- Flow is from In Box – Scanner to either these out boxes =
Recycle - File - Shred - Mail

Create a Workflow for Incoming Paper cont.

- **Choose a Procedure**

- Suppose you receive a bill, which goes in an In box. You scan it, and then the original goes into one of the Out Box.
- What point in the process do you actually pay the bill?
- What about any incoming document that requires you to do something—make a phone call, sign a form, respond to an invitation. When do you do that something? Is it before you scan, or after?

Create a Workflow for Incoming Paper cont.

- If you scan a document before dealing with it.
 - The original paper goes into an Out box, you may forget that you're not finished working with it. What if you shred a bill you assumed you'd paid, but didn't.
 - Another method is to scan first, then process by hand (tear off the form, sign the page, send the reply, etc.) immediately—before putting the scanned paper into the Out tray.
- If you scan a document after dealing with it.
 - You don't have to worry about accidentally discarding it prematurely.

What If You Can't Scan Something?

- But what about things that won't fit in your scanner? Some items are too large, too thick, too delicate.
- Here are two possibilities:
 - Use a carrier sheet, which is basically a pair of transparent plastic sheets joined at the top.
 - Use a digital camera to snap a picture with a digital camera.

Back Up Scanned Data

- Be sure to back up your data. Backups are crucial for all your files, but if you're scanning documents and getting rid of the originals, it's all the more important.
- Cloud storage is not the same thing as a backup—even if you also have a local copy of your files, and even if the cloud provider keeps multiple versions of your files (as, for example, Dropbox does). That's all good and useful, but I still recommend having at least one separate, isolated backup from which there's no possibility of accidentally deleting your files.

Keep Legally Important Documents

- Paper documents that you should always keep the originals, even though you've scanned them.
- Birth, death, and marriage certificates
- Deeds, Diplomas, Licenses, Notarized contracts, Passports, visas, and related documents, Stock certificates, Titles, Wills, Anything with an embossed, etc.

Recycle or Shred Leftovers

- To preserve your privacy and reduce the risk of identity theft, shredding anything with personally identifying information (such as address, telephone number, or social security number) on it, as well as any financial records.

Work Through a Backlog

- **Start with the low-hanging fruit**
 - Get rid of old junk mail, printouts of documents you already have in digital form, duplicate copies, unused reply envelopes, and numerous other items, so take an initial pass through your documents and toss the easy stuff first.
- **Take your time**

Do a quick pass now, then another one in a few weeks or months.
- **Use logic**
 - Keep tax-related records for the last 3–7 years, depending on the type of document.
 - you've saved every receipt and cancelled check back to the mid- 1980s, your actions defy logic and serve no useful purpose.
 - If you can't come up with a plausible scenario in which a document might someday be needed, out it goes.
 - Respect history and emotion. Some papers have sentimental or historical value, even if they have no practical value.

Last Avoid Common Printing Needs

- **Think about when You Print**
- Countless pages are printed every day just because the documents' creators wanted to have copies "for their records" or "just in case."
- **Take Notes without Paper**
- **Send Invoices Electronically**
- **Fax (Paperlessly) When Email Isn't an Option**
- **Always Print to PDF When Possible**
- **Never Print "Just in case"**
- **Carry a Mobile Device Instead of Paper**

Learn about Pocket-sized OCR Tools

- Presentation in June on Hand held OCR scanner.

Pick an OCR Application

- Presentation on and OCR software in June.