

Go Paperless!

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Host/Producer of **ScreenCastsONLINE**

<http://www.screencastsonline.com>

Mac Industry Pundit & Commentator

Mac Voices Podcast - UK & European View

Mac Roundtable Podcast - Geek Tech Podcast

The Mac Jury - Panel Discussions

MacBreak Weekly - Guest Panelist

International Speaker on Podcasting

Podcast and New Media Expo/Blogworld - L.A. 2007, 9 & 8

Macworld - San Francisco 2008, 9 & 10

Podcamp Barcelona - 2008

Session Contents

- ✦ Why Go Paperless?
- ✦ First Things First!
- ✦ What Hardware?
- ✦ What Software?
- ✦ Workflow & Considerations

Why Go Paperless?



Benefits of going Paperless

- ✦ Removing clutter & reclaiming space
- ✦ Time saving & efficiency
 - ✦ Filing & Searching
 - ✦ Tagging
 - ✦ Rapid Retrieval
- ✦ Environmental
- ✦ Save money!



Benefits of going Paperless

- ✦ Enhanced Security
 - ✦ Local Copies
 - ✦ Offsite Copies
 - ✦ Cloud Based Copies
- ✦ Paper deterioration
 - ✦ Be careful - what about the media too!



First Things First!



First Things First - Stop Paper!

- ✦ Bills and Statements
- ✦ Newspapers & Periodicals
- ✦ Paper Catalogues
- ✦ Business cards
- ✦ Junk Mail

Money In	Balance
	210.10
	190.10
	150.10
	130.10
00	121.17
	70.68
	62.40 OD
	92.40 OD
	162.40 OD
	219.65 OD

Money In	Balance
	1542.96
	1314.46
	1224.09

First Things First - Stop Paper!

- ✦ Move to Online Bills and Statements
 - ✦ Downloadable PDFS?
- ✦ Get an iPad for news
- ✦ View catalogues online
- ✦ Subscribe to RSS feeds for your favourite web sites
- ✦ What about on the move?

First Things First - Stop Paper!

- ✦ One option when on the move
- ✦ Snap it - Evernote iPhone App
 - ✦ Business Cards
 - ✦ Receipts
 - ✦ Location & Date
 - ✦ Tag and Upload



Have a Clear Out!

- ✦ Before starting to “Go Paperless”
 - ✦ Throw out everything you don't need
 - ✦ Organise your environment
 - ✦ Devise a workflow

What Hardware?

Digitising or Image Capture



Digitising or Image Capture

Scanners

- Desktop or Portable
- FlatBed or ADF - Automatic Document Feeder
- OCR - Optical Character Recognition
- Single Pass/Duplex
- Connectivity
- Resolution



Digitising or Image Capture

Resolution

- ✦ For paperless, ultra high resolution not required
 - ✦ 300 dpi for black and white
 - ✦ 150 dpi for colour/greyscale
- ✦ Reprinting?
 - ✦ 600 dpi - Why not stick with 600?
 - ✦ Speed & file size



Digitising or Image Capture

End game - What to aim for

- ✦ Remove the friction
- ✦ Make it simple
- ✦ Make it easy
- ✦ Make it quick
- ✦ Error free
- ✦ Recommendations?



Digitising or Image Capture

Recommendations?

Desktop Scanner
ScanSnap S1500M

ScanSnap
Color Image Scanner



ScanSnap S1500M for Mac

Key Features

- ❖ 20ppm Simplex/40ipm Duplex
- ❖ 50 page ADF
- ❖ Scan from business card to A3 size
- ❖ Bundled with Adobe Acrobat 8.0 Professional
- ❖ USB 2.0 Interface
- ❖ [ScanSnap S1500M for MAC Demo](#)
- ❖ [ScanSnap S1500M Flash Tour](#)

Digitising or Image Capture

Recommendations?

Portable Scanner ScanSnap S1300



ScanSnap S1300 for PC & Mac



Key Features

- ❖ Ideal for mobile and stationary use in the office
- ❖ Supports capturing documents for e-mail, printing and for use with Microsoft Word and Excel
- ❖ ScanSnap Organizer 4.1 » PDF management and search software
- ❖ CardMinder 4.1 » Business Card scanning software
- ❖ ABBYY FineReader for ScanSnap 4.1 » Top-class OCR engine
- ❖ Scan to Microsoft SharePoint Connector for Windows and Mac OS

What Software?

OCR & Organisation



OCR - Optical Character Recognition

Convert your digitised images

- Converts image files into searchable text
- Bundled with some scanners/applications:
 - SnapScan - ABBYY Fine Reader Express for Mac
 - Neatworks for Mac - NeatDesk and Neat Receipts
 - DevonThink Pro - ABBYY Fine Reader
 - Evernote - OCR in the cloud

Organising your data

Store, Search and Retrieve

- Local Applications
 - Local Folders & Hazel
 - DevonThink Pro Office
 - Paperless
 - Yep
- Cloud based
 - Evernote



Organising your data

Benefits of Digital

- ✦ Infinitely flexible filing system
 - ✦ OCR - All text is searchable - not reliant on you
 - ✦ Multiple Tags allow you to be as flexible as you want
 - ✦ Rapid retrieval
 - ✦ Visual assessment



Organising your data

DevonThink Pro Office

- ✦ Integrated Scanning
- ✦ Local OCR
- ✦ Email Archiving
- ✦ Search, Classify & Show Relationships
- ✦ Local Storage - need backup
- ✦ Built in Web Server for sharing



Organising your data

Demo

Evernote

- Integrated Scanning
- OCR in the Cloud (Images)
- Notebooks (Local & Sync) and Tagging
- Local and Web Based Storage
- Web, iPhone & iPad apps
- Email to Evernote
- Location aware, Cross Platform



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Organising your data

Demo

Security

- ✦ Evernote Premium has encryption but other options:
 - ✦ Create Local Notebooks for local storage and backup
 - ✦ Create local encrypted disk images and scan directly to them
 - ✦ Use Disk Utility to create password protected disk images

Organising your data

Demo

Security

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PDFPen

- ✦ Working with PDFS....
 - ✦ PDFPen by Smile
 - ✦ Edit PDF directly - add/delete pages
 - ✦ Sign documents electronically
 - ✦ Redact information easily
 - ✦ Includes OCR



Workflow & Considerations

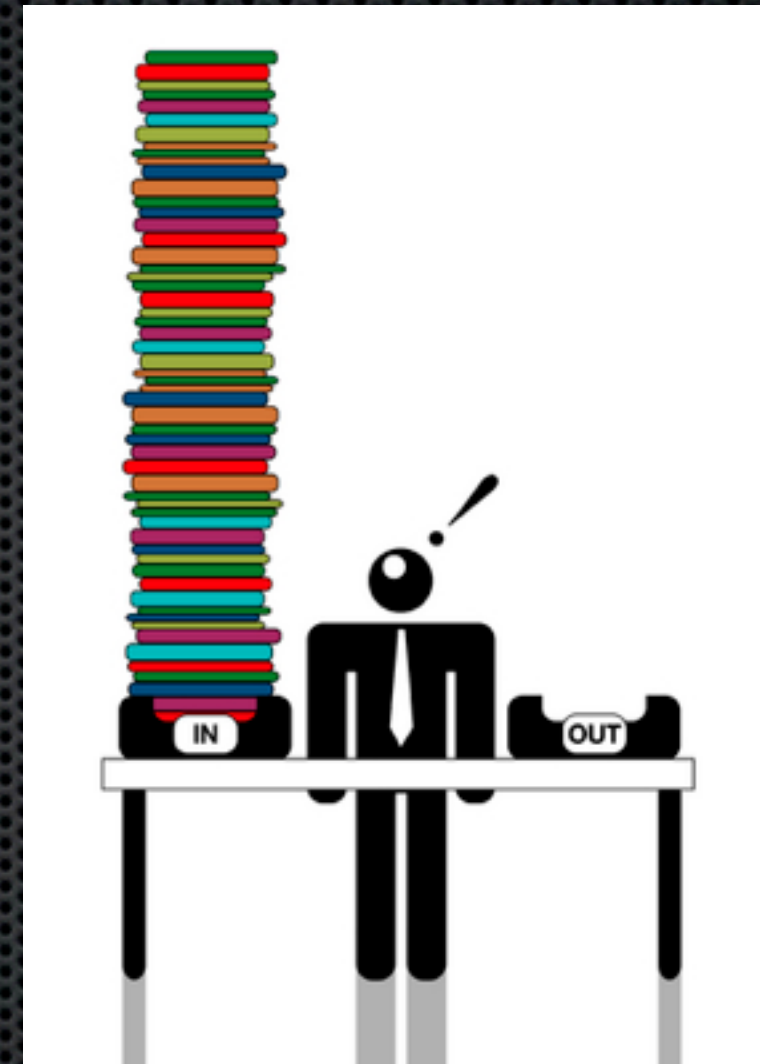
How to do it?



How to do it!

Store, Search and Retrieve

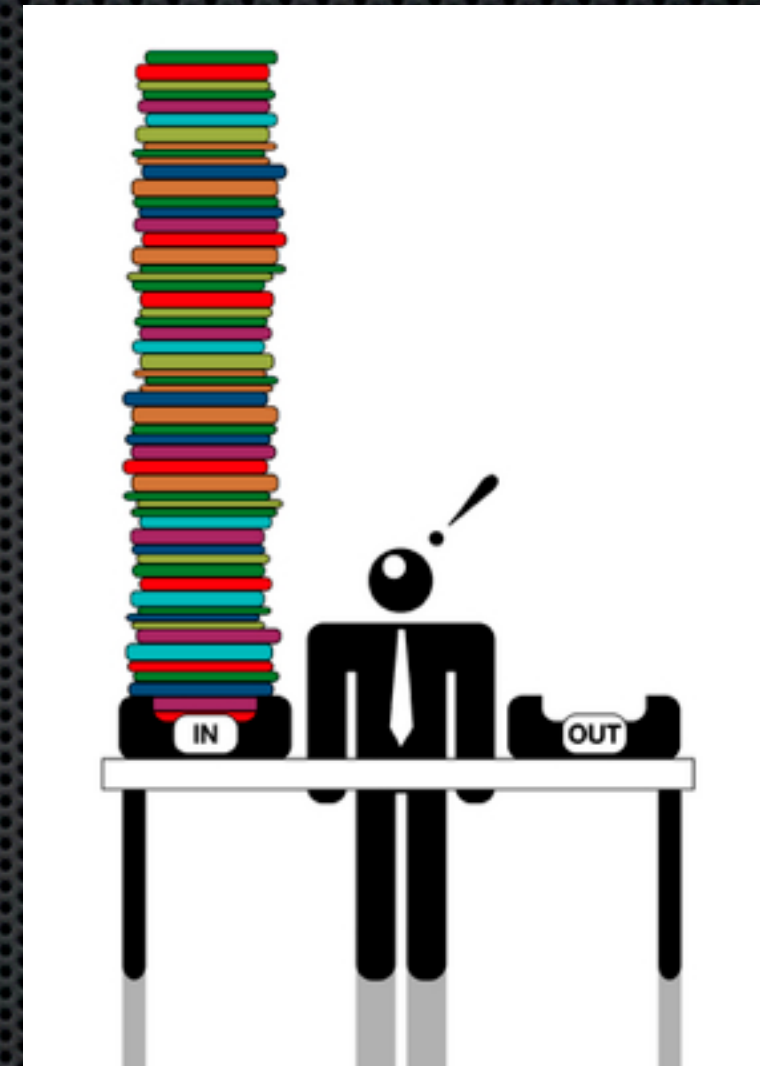
- ✦ Establish a workflow
 - ✦ Create an Inbox for Scanning
 - ✦ Options
 - ✦ Scan immediately on receipt, don't let it build up
 - ✦ Once a day minimum - tag as you go



How to do it!

Store, Search and Retrieve

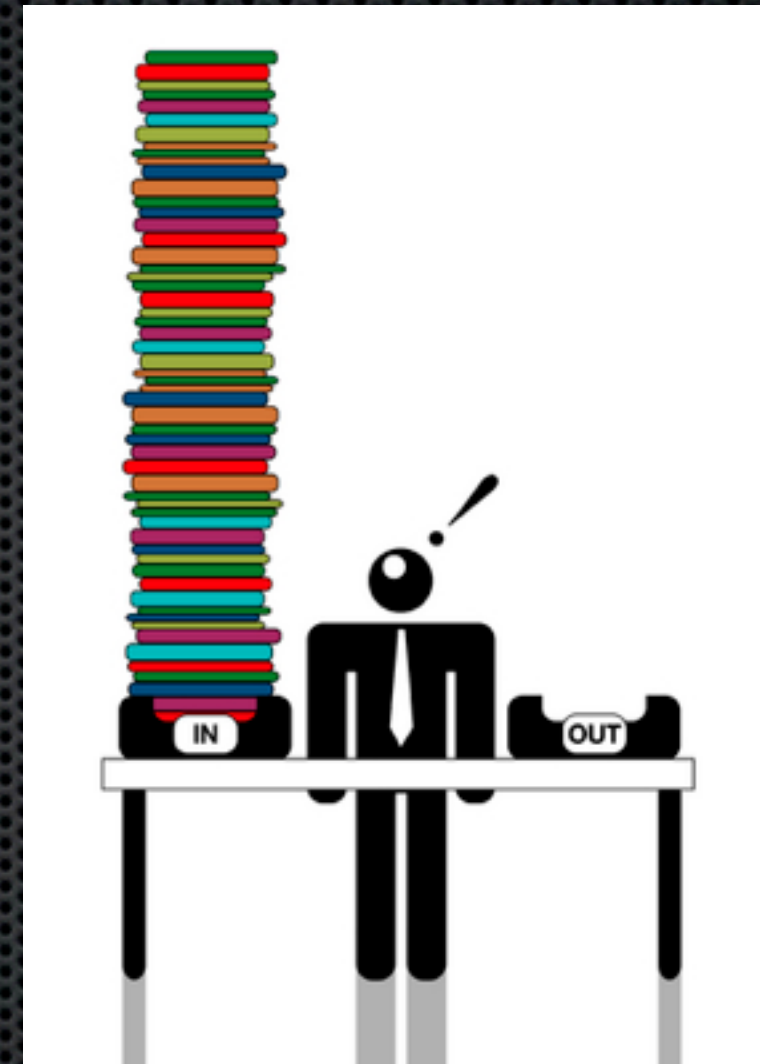
- ✦ Decide on what to do with originals?
 - ✦ Shred, Recycle, File?
 - ✦ Need to keep for legal reasons.....
 - ✦ Legal docs, Insurance Policies, Warranties, Maintenance records...



How to do it!

Store, Search and Retrieve

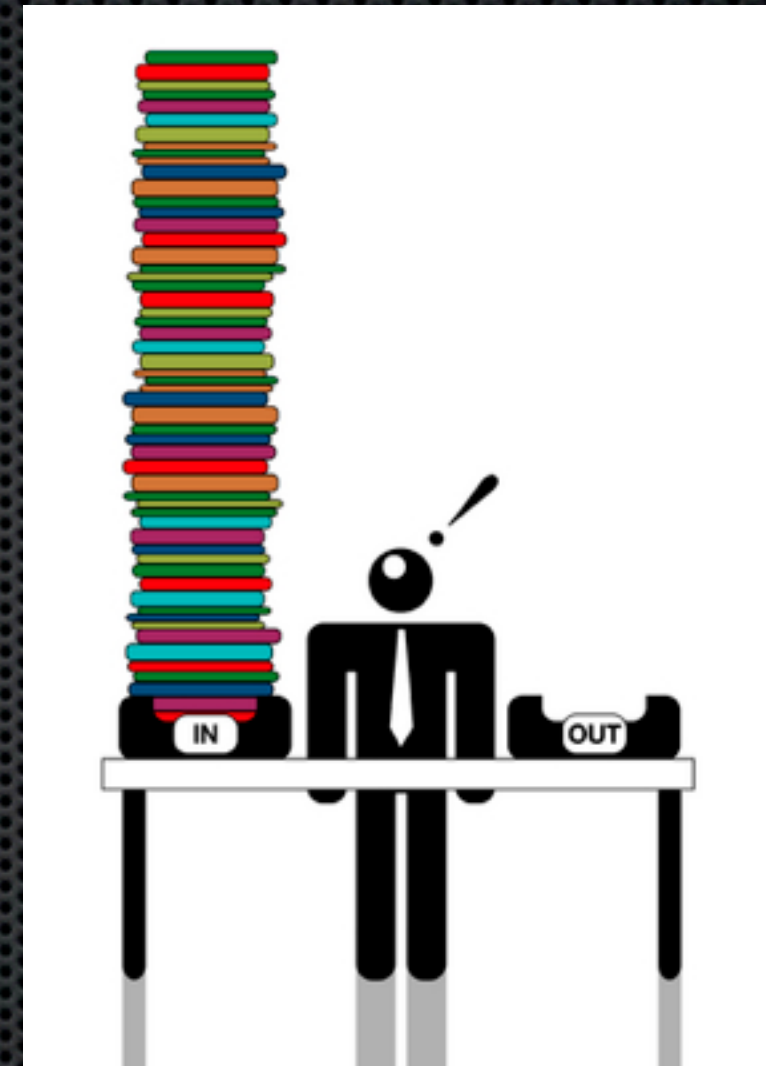
- ✦ Establish a Backup Strategy
 - ✦ “Become a Backup Ninja” Session
 - ✦ Three backups
 - ✦ Local, Offsite, Online
 - ✦ Intercept the Scan and make a copy



How to do it!

Store, Search and Retrieve

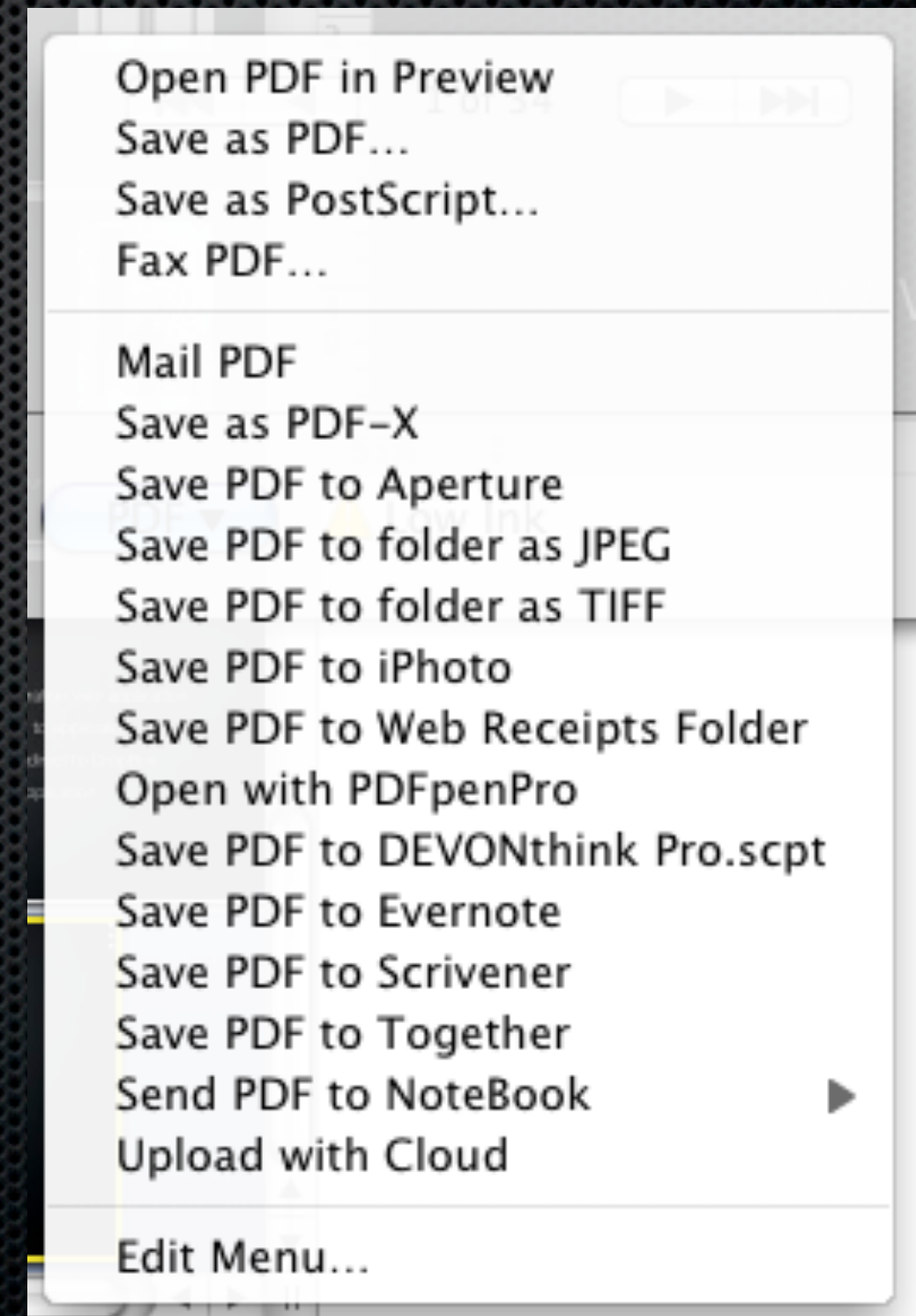
- ✦ What about the backlog?
 - ✦ Break down into small chunks
 - ✦ Set a daily target
 - ✦ Get someone else to do it!
 - ✦ Intern, family member
 - ✦ Bureau Services - Google “Bulk Document Scanning”



Moving Forward

Forward everything to your Digital Brain

- ✦ Print to PDF - Use the OSX Print Integration with application
- ✦ Use the browser plugins to print direct to application
- ✦ Printopia - Print from your iOS device direct to PDF or DropBox
 - ✦ Setup folder actions to forward to application



Any Questions?

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