



TAKE CONTROL OF
**YOUR
PAPERLESS
OFFICE**

by **JOE KISSELL**
\$14.99

**4TH
EDITION**

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Read Me First

Welcome to *Take Control of Your Paperless Office, Fourth Edition*, version 4.0.1, published in January 2024 by alt concepts. This book was written by Joe Kissell and edited by Caroline Rose.

This book guides you in the process of eliminating paper clutter by replacing many printed documents with digital versions, with special emphasis on the hardware, software, and processes needed to efficiently scan documents and create searchable PDFs. It also helps you find clever ways to reduce incoming and outgoing office paper.

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What's New in Version 4.0.1

This tiny update does the following:

- Updates pricing and details for several cloud storage services; see [Local vs. Cloud Storage](#)
- Mentions the availability of Ricoh's ScanSnap Home app for iOS/iPadOS and Android; see [Scanner-Specific Apps](#)
- Replaces the author photo

What's New in the Fourth Edition

The fourth edition is the largest revision of this book since its initial release in 2010. In the more than six years that have passed since the third edition in 2017, the technology landscape has shifted enormously. As I reread my old advice, I realized that a lot of it was fundamentally outdated; even the logical flow of the book was no longer reasonable. So, I've performed major surgery to correct these flaws and bring the book into modern times.

The most significant changes in this edition are as follows:

- Expanded coverage throughout to include Windows. (Formerly, the book was limited to Macs.)
- Discontinued the online appendixes that listed scanners and OCR software, because keeping them up to date had become unsustainable (especially as the book now covers Windows, too). Instead, I put more information directly in the book.
- Rewrote [What's New in the Paperless Office](#) to cover changes in hardware and software since the last edition.

- Mentioned in [Sign Up for Paperless Billing](#) that some services that allowed automated downloading of financial statements are no more.
- Updated the sidebar [Other Electronic Payment Options](#) with newer providers.
- Thoroughly rewrote the [Choose a Document Scanner](#) chapter to cover the huge number of changes in the scanner market, and in the process reorganized it significantly.
- Reworked the logical order of how several topics were presented. As a result, I moved [Configure Your Scanner's Software](#) earlier and changed its internal structure; I also consolidated information on naming and filing PDFs, and choosing third-party software, into a new chapter called [Refine Your Strategy](#).
- Added a sidebar, [About Automatic OCR in macOS](#), about Live Text in macOS.
- Expanded the section [Use a Document Manager](#) to cover numerous additional apps.
- Removed a chunk of text about using AppleScript to automate OCR in apps that otherwise resisted automation, and explained why in the sidebar [Why Automating OCR Doesn't Have to Be Difficult](#).
- Expanded and updated the selection of apps in [Pick an OCR App](#).
- Added new sections describing [PDF Editing Software](#) and [Search Tools](#).
- Revised [OCR on the Go](#) to cover many new or updated mobile apps.
- In [Avoid Common Printing Needs](#), updated the list of mobile apps that support PDF annotations.
- Updated much of the chapter [Sign Documents Without Paper](#) to cover numerous ways of applying e-signatures or digital signatures (which sound similar but are in fact quite different) to PDFs.
- Revised a number of sections in [Fax Without Paper](#) to reflect current options.

Introduction

My feelings about paper might best be described as ambivalent. As I write these words, I'm sitting in a library surrounded by books of the old-fashioned paper kind. I've written several such books myself, and I've often formed opinions about people based on how many books (and which ones) are in their homes. Had paper not been invented, I imagine many other characteristics of modern life as we know it would never have developed. Paper facilitated the recording of history, the dissemination of knowledge, the spread of literacy, and a great many other worthwhile things that I'm grateful for.

On the other hand, I've also written dozens of ebooks like the one you're now reading, and have shifted most of my professional and recreational reading to books in digital formats—an activity made considerably more enjoyable by the high-resolution displays on my desktop and mobile devices. I like the fact that I can search, annotate, and back up the books I read, and that I can accumulate as many as I want without running out of shelf space, as often occurs in my home.

But I lose all tolerance for paper when it comes to office paperwork—letters, forms, invoices, bank statements, receipts, business cards, flyers, note cards, catalogs, handouts from meetings and trade shows, photocopies of library book pages, and anything else that might end up on my desk in printed form. I used to have several filing cabinets full of the stuff, and overflowing, yet despite what I thought was an intelligent filing system, it frequently took me a long time to find what I was looking for. And because every day more paper would appear (some of it coming from my own printer), it was difficult to keep on top of it. The clutter became unmanageable, and I found that I spent far too much of my time managing paper rather than accomplishing useful tasks.

Never is the scourge of paper clutter more apparent than when I move, as I've done more than a few times. I get tired just looking at all those paper files, and I find myself cursing all those paper books that I love to surround myself with, because they're so heavy and bulky. But most

of my struggle with paper, I'm happy to say, is in the past. For several years now I've been moving toward a paperless office. I now receive, and generate, only a tiny fraction of the paper I once did. And virtually every paper document that comes into my life is scanned, converted to a searchable format, and digitally archived, so I can find nearly any document I need with a few keystrokes. And, because everything is backed up, I don't worry about my papers being wiped out by a fire or other catastrophe.

In this book, I explain how to do what I do when it comes to paper. By examining where and how you use paper and looking for suitable digital alternatives, you'll find that your productivity and happiness increase, while clutter and stress decrease. You might even save some money and benefit the environment.

Tip: Wondering why all offices aren't paperless already? Cecil Adams offered some interesting perspective in [The Straight Dope](#) back in 2010.

What I describe is a multi-pronged approach to eliminating paper. One of the central features of this approach is scanning paper documents and processing them in a way that retains their physical appearance while letting you index, search, select, and copy their text. I also talk about using devices such as smartphones, tablets, and e-readers to maximum advantage, as well as doing clever things you may never have thought of, like paperless postal mail and fax.

Let me be clear, though: I'm not going to tell you to get rid of all your paper, or that resorting to paper for any reason is a moral failure. Paper has many noble uses, and I wouldn't pretend otherwise. You may choose to adopt all my recommendations or only a few; everyone's different, so by all means do only what works for you.

The approach I cover is appropriate for a home office or small business—the so-called *SOHO* (small office, home office) environment. If you aspire to take a large corporation paperless, I applaud you, but that sort of project is beyond the scope of this book.

While the first three editions of this book were intended for Mac users (with the occasional nod to iPhones and iPads), by popular demand I've broadened the coverage in this edition to include Windows (and, to a lesser extent, Android devices). Regardless of your operating system(s) of choice, you should find all the advice you need here to get well on your way to your own paperless office.

Paperless Office Quick Start

This book shows you how to reduce the use of paper in your home or office and use digital representations of documents instead (or in addition). You can learn about these topics in any order, but most of the chapters follow a logical progression, so I encourage you to read linearly. In particular, I urge you not to skip [Meet Your New Paperless Office](#), which provides useful background information.

Take preliminary steps:

- If you read an earlier version of this book and have already taken steps toward a paperless office, read [Reassess Your Paperless Office Strategy](#) first; it tells you what you might want to reconsider.
- Learn about the goal and the steps you'll take to reach it; see [Meet Your New Paperless Office](#).
- Stop the flood: [Head Off Most Paper Before It Reaches You](#).

Digitize and dispose of most incoming paper:

- Decide on the most important tool for creating a paperless office; read [Choose a Document Scanner](#).
- [Configure Your Scanner's Software](#) for optimal efficiency and quality.
- [Refine Your Strategy](#) by improving how you name and file documents and exploring additional kinds of software that may help you.
- Figure out the most convenient way to process papers you receive in [Create a Workflow for Incoming Paper](#).
- Devise a plan to scan all the paper documents already in your files; read [Work Through a Backlog](#).

- Capture digital copies of documents even when you're away from your scanner; see [OCR on the Go](#).

Reduce the amount of paper you generate:

- Learn how to break a printing habit painlessly (at least sometimes) in [Avoid Common Printing Needs](#).
- Discover ways to apply e-signatures or digital signatures; see [Sign Documents Without Paper](#).
- Say goodbye to your fax machine and hello to another 300 square inches of desk space; see [Fax Without Paper](#).

Reassess Your Paperless Office Strategy

If you're reading this book for the first time, you may not already have a paperless office strategy, in which case feel free to skip this chapter for now. But I suggest returning to it in a year or two, by which time you may benefit from its recommendations. If you already have a paperless office strategy, read on to learn why and how you might improve it.

Because hardware, software, and online services change regularly, there may be better alternatives to some of the tools and workflow you now employ. And, once you have some experience converting paper documents to digital form, you may realize you're not getting the optimal efficiency, accuracy, or file sizes with your scanning setup, or that your organizational scheme isn't quite cutting it. All those things are worth reexamining periodically.

I begin with a brief “state of the union” look at what has changed in the last six years (as I write this in mid-2023) and then say a few words about [Factors to Reevaluate](#) as you reconsider your paperless office strategy, both now and in the future.

What's New in the Paperless Office

Since the third edition of this book was published, a number of things have changed that might affect the way you approach the paperless office. Here are a few examples.

New Scanners Appear

Every time I revise this book, I take a look at the range of currently available document scanners and find very little overlap with what was

available the previous time around. Manufacturers discontinue, upgrade, and replace scanners constantly.

What I've noticed recently is a trend among major manufacturers to offer a truly unnecessary range of scanner models, varying in only minor ways and all falling within a narrow price range. Another trend has been the increased prevalence of Wi-Fi and touchscreens on scanners, which together often enable scanning and even OCR without the need for any computer at all.

In addition, some new brands have entered the desktop document scanner market since the last version of this book, including Canon (which previously offered only portable and flatbed scanners) and Raven, while others, notably Neat, have stopped making hardware altogether. And the entire category of [Overhead Book Scanners](#) has mushroomed, with many new entrants.

One of the biggest pieces of news is that the ScanSnap line, formerly sold by Fujitsu, was acquired by Ricoh (see the sidebar [The Great Scanner Brand Mash-Up](#)). Other than the name change, so far very little has happened that affects consumers (either positively or negatively), but as always with big corporations, you never know what might happen in the future.

Software Choices Expand

I never cease to be amazed at the ever-growing number of apps that offer OCR of one kind or another. A limited form of OCR is now even built into macOS (see the sidebar [About Automatic OCR in macOS](#)). OCR software has become ubiquitous, nearly to the point of being a commodity item. That means there's pressure both to keep prices low and to improve quality.

At the same time, I've seen a shift in the brand-specific software that ships with every scanner. Whereas OCR was once a premium offering, now it's considered fairly standard to include (at least as a basic option) a simple "Searchable PDF" checkbox that performs OCR automatically as a scan is created, without the need to funnel a bitmap image into a separate app. (Separate OCR apps are still commonly bun-

Meet Your New Paperless Office

The idea of a paperless office may sound enticing, or even inspiring. It may also sound intimidating. If you make the transition to a paperless lifestyle, what steps will you have to take—and what will you get in return? In this chapter I look at the advantages of a paperless office (ranging from obvious to novel) and then describe some of its crucial components. I also help you imagine what your paperless office will ultimately look like.

Learn the Benefits of Ditching Paper

Since you're reading this book, chances are you already have a paper-related problem you're trying to solve. You know the ways in which paper is causing you pain, so it's apparent how a paperless office would be soothing. In fact, a paperless office can solve many problems simultaneously—including some you didn't even realize you had! Let's look at what you can accomplish by moving from paper to digital:

- **Reduce clutter.** Clutter reduction is a recurring theme in this ebook. “Clutter” may refer to the untidy piles of papers that litter your desk and haphazard filing systems, but even a scrupulously organized collection of paper documents counts as clutter if it takes up too much physical space—or too much of your attention—for comfort. Scaling back on paper brings order back to your office, and also frees up space on your desk and in your brain.
- **Save time and effort.** Filing a single document may take just seconds, but the endless process of filing, searching for, retrieving, and replacing papers can add up to hours per week. 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.

- **Save money.** In a paperless office, you save a little bit of money on paper (hey, it's not that expensive in the first place), but when you add up the savings in printers, photocopiers, ink or toner cartridges, envelopes, file folders, filing cabinets, extra office space to hold all the filing cabinets, and so on, the amount becomes more interesting. Even better, you're saving time (the previous point), which means you can be more productive.
- **Search everything.** You already know that you can search the files on your computer easily. Wouldn't it be great if an electronic search could also turn up documents you've received in the mail, your old school records, business cards you received years ago, posters you saw hanging at the supermarket, and any other piece of text that you've encountered? (It took me about two minutes to determine that my father got an F on his final French exam in 11th grade, because I'd scanned all his old report cards!)
- **Share documents easily.** Printing or photocopying documents and then handing or mailing them to other people is so 20th century. I can share digital documents with nearly anyone in a few clicks, and why shouldn't that ease extend to paper documents?
- **Back up physical documents.** You back up your digital photos and business documents (don't you?), but what if your tax returns, insurance records, contracts, and other crucial papers were lost in a fire or other disaster? Create digital versions and you can back them up too. As a bonus, you can give yourself remote access to all your scanned documents—something that's tricky to pull off with paper!
- **Save the planet.** I like to think I'm as concerned about the environment as the next guy, but my interest in reducing paper consumption has nothing to do with saving trees, eliminating waste, shrinking my carbon footprint, or any such thing—although using less paper does all that too. I do it because it makes me happier, and it just so happens that it's good for the planet (at least in a small way) as well.

Head Off Most Paper Before It Reaches You

In the chapter after this one, we begin the process of selecting, setting up, and using a scanner to digitize your papers. Once that's done, you'll be able to discard (most of) the originals so they no longer clutter your office. That's great, but wouldn't it be better still if the paper never reached you in the first place?

Before we attack the current and future paper flow, it makes sense to find as many ways as possible to prevent paper from arriving at your desk at all (assuming, of course, that you can obtain suitable digital replacements). This chapter provides a few ideas along those lines.

Sign Up for Paperless Billing

Most banks, insurance companies, utilities, phone companies, periodicals, schools, tax offices, and other entities that expect money from you on a recurring basis offer some form of paperless billing (or statements) and payment. This practice is becoming so prevalent that some companies now charge extra for paper bills, while others no longer offer them at all. In a typical case, you set things up such that you receive bills or statements by email and then pay either manually by credit card or automatically by preauthorized bank withdrawal.

I'm a big fan of paperless billing, and I use it as much as I can. Without it, I have to contend with a paper check (and frequent checkbook re-fills), a payment stub, a stamp, and a return envelope. And after all that, I still have an outer envelope (which goes in the recycling bin) and a paper bill I'll probably never look at again (which goes in the filing cabinet).

On the other hand, with paperless billing I generally get a PDF copy of my statement that I file on my disk and the convenience of paying in a

few clicks—or, in many cases, none at all. In the case of automatic payments, I also get peace of mind knowing that a faulty memory, illness, or other distraction won't leave me in the dark or the cold.

So, your first mission is to think about what sorts of recurring payments you make that still require an exchange of paper, and see whether the payee offers a paperless option. The easiest way is to look online every time a paper bill appears in your mailbox.

However, before you go crazy making everything paperless, spend a few moments pondering the following:

- **Is your email under control?** If you have an overloaded inbox, or a flaky spam filter, such that you're likely to miss emailed payment notices, you might want to get that under control. (If you have payments set up to be deducted from a bank account automatically, this is much less of a worry.) Also, you might want to read my (old but still good) Macworld article series [Empty your Inbox](#).
- **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 because you're on vacation, sick, or otherwise incapacitated. Does your spouse or partner have a reliable way to check and pay your bills? If not, talk it over and devise a plan before committing yourself to paperless billing.

Tip: You're less likely to miss billing notices if you set up a special email address to use only (and always) for bills and make sure both you and another person check that account regularly.

- **Do you monitor balances and schedules carefully?** I check my bank balances several times per week, and I have reminders on my calendar about upcoming payments, so I can be certain there's enough money in the right accounts to pay bills when they come due. If you do, too, or if you're willing to change your habits to check your balances regularly, paperless billing is a good fit for you.

As a corollary, keep in mind that sometimes things Just Don't Work. Random server or router outages, or other gremlins in the

Choose a Document Scanner

Although the suggestions in the previous chapter should help you cut down on the volume of paper that comes into your life, they won't stop it altogether or eliminate the paper you've already accumulated. So, we move on to the next phase: scanning your documents so you have searchable digital copies, after which you can (at your discretion) recycle, shred, or file the originals. To accomplish this task, you'll need a scanner—and not just any scanner. In this chapter I explain what makes an ideal scanner for this specific application, mention a few good candidates, and help you decide which one to buy.

I want to warn you up front that the type of scanner I recommend is not cheap. A \$50 model probably won't cut it; prices in the neighborhood of \$300–600 are more likely. But if time is money, you'll recoup your investment many times over.

Quick Scanner Advice

If you want to save yourself the time and effort of poring over the features and specifications of dozens upon dozens of scanner models, take my advice and buy the [Ricoh ScanSnap iX1600](#), the top-of-the-line ScanSnap model as of mid-2023, or its budget sibling, the [ScanSnap iX1400](#).

I've used five different ScanSnap scanners over the years and have always been pleased with their reliability, bundled software, and ease of use. You can find fancier scanners that are faster and tougher but more expensive, and less expensive scanners that sacrifice speed, quality, or features. In my opinion, the iX1600 is right at the sweet spot, as it includes all the features I care about for my own use. If you're content to take this advice, you can skip (or lightly skim) the rest of this chapter.

Learn Why Document Scanners Are Different

Typical desktop document scanners look somewhat like fax machines (remember those?): you load the pages to be scanned in the top, and the scanner pulls them through *quickly* (often at a pace of 30 pages or more per minute), scanning *both sides at once*. (Compare this with flatbed scanners and multifunction devices that require two passes to scan both sides of a page; even if the process is automated, it still takes twice as long.)

What's the catch? Well, you trade off resolution, for one thing. Document scanners usually max out at 600 dpi (dots per inch), whereas 4800 dpi or even higher is more common for flatbeds. But it turns out that for this type of scanning, lower resolution is exactly what you want—and as I explain ahead, in [Resolution](#), there may be good reasons to go even lower than 600 dpi.

Another trade-off is that document scanners limit the dimensions of your documents. Letter- and legal-size pages are no problem, and most of them can handle smaller sizes, such as business cards and receipts, too. But larger pages, materials that are especially thick or stiff, and extremely delicate papers often pose problems for document scanners.

Even so, for the vast majority of office-type scanning, the benefits of document scanners far outweigh their limitations.

Note: There are also upright duplex photo scanners that look like document scanners but are optimized to provide the best combination of fidelity and speed for photos, while also supporting documents (including OCR). The Epson [FastFoto Wireless High-Speed Photo Scanner](#) is a nice example.

Later in this chapter, I talk about types of document scanner that don't quite fit the mold, including compact and portable models, overhead book scanners, and multifunction devices. Regardless of your needs, budget, and space constraints, there's a model for you.

Configure Your Scanner's Software

Once you've obtained a scanner, you'll download and install the accompanying software on your computer. (If you opted for a network-enabled scanner that does OCR in the cloud, there may be nothing to install, but you'll still have to configure the settings to your liking.)

Your main goal at this point is to create searchable PDFs with your scanner as quickly and easily as possible. But even the best OCR software can produce lousy results if you don't set it up just so and give it the best possible input material to work with. You're looking for a combination of settings that gives you the best balance of OCR accuracy, processing speed, image quality, and file size. I help you figure out what those are in this chapter.

For now, I suggest sticking with the software that came with your scanner, whatever that may be. If, after setting everything up and scanning a number of documents, you feel you need more features, better accuracy, or other improvements to your setup, you can learn about additional options and apps in the next two chapters.

Understand the Scanning Process

Every scanner comes with customized software that handles the low-level communication between the scanner and your computer. For example, if you have a Ricoh ScanSnap, the scanner-specific software is called ScanSnap Home, with a Canon imageFORMULA scanner you'd use Canon CaptureOnTouch, with an Epson scanner it would be Epson ScanSmart, and so on. This software is responsible for taking the raw data your scanner produces and turning it into a bitmap image stored on your disk.

Scanner-specific software always provides some means of setting preferences such as resolution, destination, and file format. It may include many other capabilities, too, but for the moment, assume that its only purpose is to spit out a bitmap image, as shown in the top row of **Figure 1**.

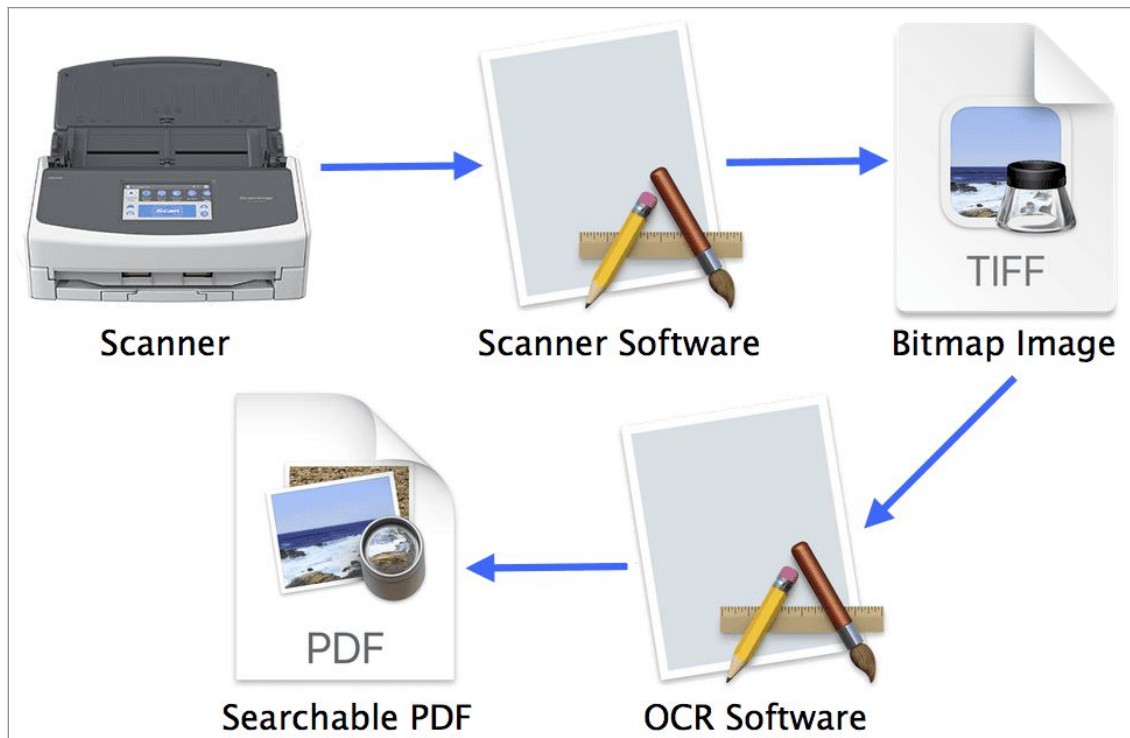


Figure 1: Produce a bitmap image (top row only) or a searchable PDF from paper documents with as little manual effort as possible.

If you're scanning photos, the bitmap image is all you need, but for scanned documents an additional step is necessary, as shown in the bottom row in **Figure 1**: after the bitmap is saved, a piece of software—which may or may not be the same app that created the bitmap—performs OCR on the image and generates a searchable PDF file.

Since you want to avoid manual effort whenever you scan, you may be concerned that more than one app might be involved. Fortunately, the process has these potential shortcuts that nearly always make it seamless:

- Some scanner software has built-in OCR capabilities, so you can skip the second app and go straight from scanner to searchable PDF without saving an intermediate bitmap file. Similarly, some docu-

Refine Your Strategy

After getting your scanner and its software set up, scanning a small stack of documents, and testing the results with searches, you may feel that everything is working exactly as you'd hoped, in which case feel free to skip ahead to [Create a Workflow for Incoming Paper](#). But I've noticed over the years that a lot of people get hung up on certain tasks that derail their best intentions because the tasks are confusing, ambiguous, or otherwise frustrating. If you start to notice friction in your paperless office scheme, you may need one or more optimizations.

This chapter begins with a discussion of the interrelated tasks of naming and filing your scanned documents, both of which play an important role in enabling you to locate and use those documents later. Then we move on to review other apps, besides what came with your scanner, that may help you manipulate, store, and find your searchable PDF files.

Choose a Naming and Filing Strategy

Naming your searchable PDFs and filing them (that is, storing them in some particular location) may be entirely separate activities, but it usually makes sense to do them together. Your scanner's software may encourage or even demand that you make decisions about these tasks. So, it's a good idea to think through your options carefully.

Fundamentally, you have four questions to answer:

- **When do you want to name and file the documents?** Do you want to name them as you scan them or at some later time? I cover this topic next, just after this list.
- **What do you want to name the documents?** You can choose any name you like, but for ease of finding documents later (especially if others will access them too), you should think about which conventions you'll use. Read [Choose a Naming Convention](#).

- **How do you want to store and retrieve the documents?**
Storage and retrieval are two sides of the same coin. You can store your searchable PDFs as regular, standalone documents that you'll find and retrieve using the Finder (Mac) or File Explorer (Windows), or you can store them in the database of a document management app, then use that app to find and retrieve them. See [Choose a Storage and Retrieval Method](#).
- **Where do you want to store the documents?** Regardless of whether you store individual files or use a document manager, will you keep the PDFs on your local disk, on a network server, in the cloud, or in some combination of these places? All in one big folder or in a more elaborate structure? Read [Choose a Destination](#).

Decide When to Name and File Documents

As you perform OCR on your scanned documents, you have three basic choices as to what happens next:

- You can be completely “hands off” and let your software name and file the documents automatically.
- You can intervene immediately by giving your documents names (and sometimes tags or categories, described ahead) and filing them.
- You can stick with an automatic name at first but then manually name and file your scans later, at your leisure.

I can think of good reasons for choosing any of these approaches, but the important thing is to weigh the pros and cons, decide how you want to handle the process, and stick with it.

Use the Hands-Off Approach

The appeal of the entirely hands-off approach is obvious: it requires no effort other than pressing a button. If you're concerned that you'll otherwise never get around to scanning, that's a significant positive.

On the negative side, if you let your software name scanned documents, the names (usually a string of numbers based on the date and

Create a Workflow for Incoming Paper

Your scanner and software are now set up to process whatever you throw at them, and you've already thought about at least some elements of your workflow, such as what you'll name your searchable PDFs and where you'll store them. To make your life even easier, you should take a moment to think through the physical path that papers will take from the time they enter your office to the time they leave it (or get filed), as well as how you'll find and use their contents once the originals are gone. This is the crux of the paperless office: the new workflow you'll follow, which will require you to adopt or modify some habits.

In this chapter I make sure you have a grip on the strategy for what you'll actually do when paper appears and that you understand when and why to keep certain papers and what to do with the rest.

Create a Physical Paper Path

If you're an organized, "everything in its place" kind of person, what I'm about to say may seem obvious. But I've known few people who keep every piece of paper strictly under control. Many (including myself) seem to have papers piled everywhere and, as a result, at least occasionally lose track of what's where and what needs to happen to which papers. Since you're about to embark on a new system for dealing with paper, this is an excellent opportunity to figure out, definitively, what happens to all papers as soon as they come into your possession. Thus, I want to propose the following Life Principle:

Have a well-defined location for every stage of a paper's journey.

Let me explain what I mean and how you can make this happen.

Buy Some Boxes

I'm going to ask you to acquire at least two boxes, and maybe as many as six or eight (I explain why in a moment). When I say "box," I don't care whether it's an actual box, a plastic or metal tray, a wall-mounted paper holder, a file folder, or a taped-off corner of a desk. However you want to think of a box, make sure you have multiple geographical areas of at least 8.5 x 11 x 2 inches each that you can designate for special uses.

Think about the traditional idea of an In box and an Out box: two trays sitting on a desk, one labeled In for incoming correspondence, and one labeled Out for outgoing correspondence. This arrangement (which I confess I've never seen anyone use in real life) presumes that your In box is, in some sense, your to-do list and that someone else—perhaps a mailroom employee—is responsible for putting things there. You'll work through each item in that tray, reading it and 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 in the Out box, where they're picked up periodically by the same person who puts things in your In box.

Now 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

In other words, you take something out of the In box and scan it, and as soon as it comes out of the scanner it goes in the Out box. The path the paper follows is simple, obvious, and unambiguous. All you have to do is get in the habit of scanning the contents of the In box regularly—we'll return to that in a moment—and periodically emptying the Out box by filing, recycling, mailing, or otherwise dealing with its contents.

Such a setup may be adequate for people who receive relatively few pieces of paper and are disciplined enough to move things from In, through the scanner, to Out, quite often. However, more complex needs may require some refinement.

Work Through a Backlog

Your scanner, OCR software, and paperless workflow may do a marvelous job of helping you deal with new paper as it comes in. But if you already have tens of thousands of pages in filing cabinets, you need to deal with all those existing documents too. It can feel overwhelming, but with the right approach you can work your way through even a substantial backlog in a reasonable period of time.

Prune Unnecessary Documents

I grew up in a family of packrats, so to some extent I feel a compulsion to save everything, just in case it might be useful some day in the distant future. I try valiantly to fight it, but it always feels a bit painful to get rid of anything. That includes papers, of course, so for many years I accumulated box after box and drawer after drawer of papers, most of which I'd clearly never need to see again.

When I began my paperless office project, it was obvious that many of those papers could and would disappear, but a significant question was whether they should be scanned first. If I scanned everything, it could take months, and much of that time would be wasted, because the digital copies would do me as little good as the paper copies.

I readied a recycling bin, steeled myself, and adopted the most ruthless attitude I could muster—and then went through my papers, tossing as many as possible. Quite a few struck me as borderline, so I left them, but I repeated the process every six months or so, and each time found more papers I could live without having in physical *or* digital form.

If you have such a huge collection of papers that scanning them all would be inconceivable, consider doing the same kind of pruning I did. Everyone's different, but I can offer some general words of advice:

- **Start with the low-hanging fruit.** Take an initial pass and toss what you *know* you can get rid of: old junk mail; printouts of most

documents you have in digital form; duplicates; unused reply envelopes; and numerous other obviously unnecessary items.

- **Take your time.** You don't have to prune all the unnecessary stuff in one session. Do a quick pass now, then another one in a few weeks or months. Over time it gets easier.
- **Use logic.** For those of you who pay taxes in the United States, the IRS strongly recommends that you keep tax-related records for the last three to seven years, depending on the type of document. Fine, but if you've saved every receipt and canceled check back to the mid-1980s (as I used to, before going paperless), 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.

To learn exactly what the IRS suggests in terms of preserving documentation, read the [Recordkeeping](#) topic. Of special note: the IRS accepts electronic copies of documents and even permits you to destroy paper originals, as long as certain criteria are met. For details, see [IRS Bulletin No. 1997-13](#) (PDF), specifically Revenue Procedure 97-22, which starts on page 9. (This information used to be much easier to find, and I wish it still were!) Obviously, this applies only to U.S. taxes; for other countries, check with your tax authorities.

- **Respect history and emotion.** In the interest of balance, I must admit that some papers have sentimental or historical value, even if they have no *practical* value. If those old love letters, high school papers, or other artifacts produce tears of nostalgia or might come in handy when writing your memoirs, or if you want to be able to show them to your grandchildren in physical form, by all means keep them.

Note: I say much more about digitizing and saving photos, printed artifacts, and other memorabilia for future generations in my book [Take Control of Your Digital Legacy](#).

OCR on the Go

Perhaps you bought a portable scanner (see [Portable Scanners](#)) to take on business trips. That's great, but you can't always have your scanner with you. And even if you did, it wouldn't help with documents that won't fit in it—menus, posters, billboards, street signs, and so on. But all these and more are still fair game for capture and OCR. You just need a digital camera (which could be the one in your smartphone, iPad, or other mobile device) and an app to do the necessary processing. With the right mobile tools, you may find yourself scanning receipts and business cards on the spot.

Learn About Mobile OCR Tools

Very likely you have a device in your pocket that includes a camera, a wireless network connection, and the capability of running third-party apps. If so, you can do many of the same things you can do with a desktop or portable scanner and OCR software, and in fact you can do a few cool things more easily. For example:

- You can store photos of business cards, receipts, signs, posters, billboards, and the like in the cloud and be able to search their text along with all your other notes and documents.
- You can photograph large or awkwardly shaped documents and perform OCR on them almost instantly.
- You can snap a picture of a menu at a French restaurant and, a few seconds later, get an English translation.
- You can capture an image of something containing text and have that text read to you by a synthesized voice. (Sometimes you can even combine this with translation.)

These sorts of tools are great for travelers, especially those who spend time in places where they don't read the local language well. But

they're useful for anyone who, from time to time, wants to create a searchable record of something they can't put through a scanner.

I should mention that, in many cases, apps that run on mobile devices don't produce searchable PDFs as such. The data may be stored in some other format, or you may need to use a proprietary system for searching it. Even so, such apps offer enormous advantages.

Pick a Mobile Scanning App

There are hundreds upon hundreds of mobile apps that offer scanning features of one sort or another. However, not all mobile scanning apps are created equal. For example, some create PDFs but don't perform OCR to make them searchable; others do perform OCR but create only plain-text files, not PDFs. Some work only on Android or only on iOS/iPadOS, while others are multiplatform. And some have special features that focus on business cards or receipts. So, be sure to read the fine print when considering which apps to buy.

Although I can't begin to do justice to the huge range of mobile apps in this category, here are a few representative examples out of many hundreds, divided into broad groups.

Business Card Scanner Apps

Dozens of apps let you snap a photo of a business card and extract the content to your Contacts app. Examples include:

- [ABBY Business Card Reader Pro](#) (iOS/iPadOS)
- [SamCard](#) (iOS/iPadOS)
- [ScanBizCards](#) (iOS/iPadOS, Android)

Avoid Common Printing Needs

Now that you've taken numerous steps to avoid receiving paper from others and to get rid of the paper you still do receive, there remains another piece of the puzzle: how to stop generating more paper of your own. Kicking the printing habit can be hard, but in this chapter I help you to identify alternative ways in which you can achieve roughly the same end result.

Think (and Track) When You Print

You may hit ⌘-P or Ctrl-P dozens of times each day, out of habit or necessity. Sometimes printing truly is necessary; until all your business associates and family members join the paperless revolution, you'll be obligated to print certain things for their consumption. But countless pages are printed every day just because the documents' creators wanted to have copies "for their records" or "just in case." Those printed pages are the ones you can most easily eliminate.

So, as an exercise, try this for a week: Put a piece of paper—yes, paper!—next to your printer, with three columns, labeled Document, Pages, and Purpose. Every single time you pick up something from the printer, jot down the following information:

- **Document:** This could be the document's name, or just a word or two that reminds you what it was.
- **Pages:** The number of pages in that document.
- **Purpose:** Let's keep it simple, and make it one of "F" (for file), "R" (for review), or "O" (for other people). Things you print simply to put in a folder or filing cabinet get an "F"; things you print because you need to read them on the plane, mark them up with comments,

or otherwise review them, get an “R”; and things you print because you have to give, send, or show them to someone else get an “O.”
(Feel free to expand or customize this list according to your needs.)

At the end of the week, review your list. You may be surprised at how many pages you’ve printed and, of those, how many are less than essential. Merely paying attention to what you print may help you be more conscious of how (un)necessary certain printouts are and cut back accordingly. But you may be able to go further, by eliminating as many of the “F” and “R” items as you can. (It’s likely that at least some of the “O” items can also be replaced with digital alternatives, as I discuss in [Carry a Mobile Device Instead of Paper](#).)

I hope I’ve persuaded you in the course of this book that digital copies of files are just as useful as printed copies, and often more so—as long as they’re diligently preserved, backed up, and accessible when you need them. Unless you’re complying with rules set down by your employer, the government, or some other entity, the only thing forcing you to keep printing “F” items is habit. Try going without printing those items for a week or two (keeping in mind the other suggestions later in this chapter) and see how you feel.

And as for the “R” items...

Review and Annotate Documents

If you’ve spent years editing documents by hand, on paper and maybe in red ink, it can feel unsettling to think about switching to a paperless method. I can’t change how you feel, but I can tell you that paperless reviewing and annotation tools exist, are both powerful and easy to use, and offer numerous advantages over paper. I think they’re well worth a try.

Many apps that can open PDFs—including Preview (built into macOS), Nitro PDF Pro (Mac, Windows), DEVONthink (Mac), and Adobe Acrobat (Mac, Windows)—can also *annotate* them. (See [PDF Editing Software](#) for even more options.) Annotations are markings and notes that

Sign Documents Without Paper

When a document requires a signature, it's natural to assume that means ink on paper. Sometimes it does, but in a great many situations you can “sign” and electronically deliver a document, whether you originally received it in digital or physical form.

In this chapter I begin by talking about situations in which the recipient needs to see your handwritten signature. For many contracts, legal agreements, and other day-to-day business documents, you can substitute a copy of your signature that's scanned or drawn by hand with a mouse or trackpad, sometimes called an *e-signature*. It's also possible to collect someone else's handwritten signature on the go, typically using an iPad or other mobile device.

There's another concept you should be aware of: a *digital signature*, which is a way of certifying that you, and you alone, are the sender of a message or the signatory of a document. I cover this sort of signature briefly toward the end of the chapter.

Determine When a Pseudo-Signature Is Acceptable

When someone asks you to sign a document, ask this question:

Can I return this by fax or email, or is an original signature required?

You'd be surprised how often electronic transmission of a signature is considered perfectly valid. I've done this countless times myself—for example, when returning contracts for writing magazine articles and doing technical reviews for new books; if the other party is content with fax or email, I'm happy to oblige. In cases where only an original

signature is accepted, I send a piece of paper, but in my recent experience that happens mainly where the thing to be signed is of tremendous gravity (or a lot of money is involved). You'll probably need ink on paper for a marriage license, an affidavit, or anything that must be notarized by hand, but for run-of-the-mill contracts and agreements, an electronic signature should suffice.

I've heard that some financial institutions use software that flags signatures that appear to have been added digitally on faxes. Although I have no technical information on how this works and don't know which institutions use such a system, be aware that in rare cases you might get a phone call asking you to confirm a signature, even when the recipient accepts a fax.

Scan Your Signature

Although (as I discuss in a moment) there are numerous ways to draw your signature with a mouse or trackpad, I've never found such methods to result in anything that looks like my actual signature. If you want fidelity with your handwritten signature, the first thing you need is a good digital copy of that signature. To make one, follow these steps:

1. On a clean, white, unlined sheet of paper, sign your name in dark ink at a normal size. If your signature takes on multiple forms, put them all on the paper. For example, sometimes I sign my name "Joe Kissell," sometimes "Joseph Kissell," and sometimes "Joseph W. Kissell," depending on the context, and occasionally only my initials are required on certain pages.
2. Scan the page with your signature on it. If your scanner is normally set to reduce the resolutions of scans, bump it back up for this one; 600 dpi is a good choice. And even if you sign your name in black ink, do the scan in color. These extra tweaks will improve the quality of your scanned signature, which will in turn increase its perceived authenticity and the flexibility you have in using it later.

Fax Without Paper

You may think of fax as an outmoded technology, long ago supplanted by email, but countless people still send and receive faxes every day. In certain environments—notably medical and legal practices—it’s widely considered more reliable and more secure than email. If you can’t remember the last time you had to deal with faxing documents, feel free to skip this chapter. But if you do find a need to send or receive documents by fax, even if only occasionally, this final chapter explains how to do so without owning a fax machine or generating any paper.

Receive Incoming Faxes

I’m not shocked that people still send and receive faxes, but I am a bit baffled as to why anyone would want a *fax machine*, as such, in this day and age. Apart from the bulk of another device, there’s the infrastructure. Although a fax machine can sometimes share a landline with a telephone, doing so makes it more awkward for both the fax sender and the receiver—and if you give it a separate line, that’s an extra monthly expense. Who needs all that bother?

Note: In this discussion I’m ignoring multifunction devices that combine printer, scanner, copier, and fax machine, because most of the arguments against using them for receiving faxes are the same as those against using a standalone machine.

There’s a better way to receive faxes, without having an extra box on your desk and without generating extra paper: a fax gateway.

A typical fax gateway works like this: You sign up with a provider and receive a private fax number. (Usually, you get to choose the area code—and sometimes the exchange.) When a fax machine dials that number, a computer answers, receives the incoming fax, and saves the image as a digital file (perhaps a PDF or a multi-page TIFF). Then it sends you the file as an email attachment—or, in some cases, it merely

sends you an email notification and lets you download the image itself using a web browser or desktop app.

Note: Some fax gateways let you keep your existing fax number. (Check the provider's website, as details change frequently.) If lots of people already have your current number, using a service that requires you to switch to a different number may be inconvenient.

As far as the sender is concerned, the experience is identical to sending a fax to an ordinary fax machine; they'll never know that's not what they did. But from your point of view, receiving a fax is just like getting an email message. There's also a bonus: you can perform OCR on the incoming fax, just as you can on any scanned document (if the fax service provider doesn't already do this for you), and then archive it along with all your other searchable PDFs.

Oodles of companies offer services like this, and pricing plans vary. You may pay a monthly fee, a per-fax or per-page fee, or a combination of these. But the prices are invariably less than what you'd pay for an extra phone line plus paper, toner, maintenance, and electricity for a standalone fax machine. Here are just a few examples:

- [DropboxFax](#) (formerly HelloFax)
- [eFax](#)
- [FAX.PLUS](#)
- [FaxBetter](#)
- [MetroFax](#)
- [mFax](#)
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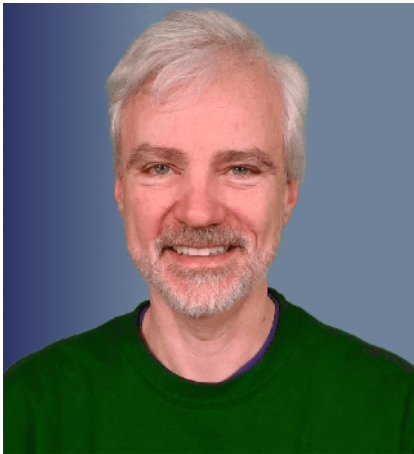
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Joe Kissell is the author of more than 60 books about technology. In 2017, he also became the publisher of Take Control Books, when alt concepts—the company he runs along with his wife, Morgen Jahnke—acquired the Take Control series from TidBITS Publishing Inc.’s owners, Adam and Tonya Engst. Before he began writing full-time in 2003, Joe spent nearly eight years managing software development. He holds a bachelor’s degree in Philosophy and a master’s degree in Linguistics.

In his rare non-work hours, Joe likes to walk, cook, eat, and practice tai chi. He lives in Saskatoon, Saskatchewan, Canada, with Morgen and their sons. To contact Joe about this book, [send him email](#) and *please* include [Take Control of Your Paperless Office](#) in the subject. You can also follow him on Mastodon ([@joekissell](#)) or visit his personal website, [JoeKissell.com](#).

Credits

- Publisher: Joe Kissell
- Editor: Caroline Rose (fourth edition), Michael E. Cohen (first through third editions)
- Cover design: Sam Schick of [Neversink](#)
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Take Control of Your Paperless Office, Fourth Edition

ISBN: 978-1-990783-33-3

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