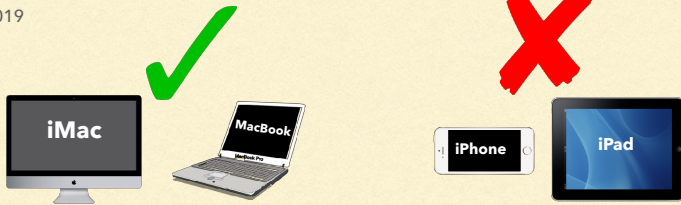


GOING "PAPERLESS"



If you're looking for the slide handouts, please re-read the above!

Rod Hannaford
January 8, 2019



Today's Topics

- Doug will load these slides to the RMUG site
 - Download it...read it...but don't print it!
- Why would you go paperless?
- Getting started
- Tips & techniques
- Organizing your scanned documents
- Backup
- Scanner demo



We keep a lot of paper...

- Credit/debit card receipts
- ATM slips
- Utility bills/statements
- Property tax bills
- Insurance policies
- Home purchase documents
- Receipts for major purchases (car, furniture, appliances, etc.)
- Bank & financial investment statements
- Vendor invoices & contracts
- IRS documents
- IRCC/HOA/PUD documents
- ...and a wide variety of other personal documents



Why Go Paperless ?



- Get rid of paper clutter
- Stop hauling paper between homes
- Quick & easy access to all your documents
- Reduce your "paper footprint"
 - Save energy, water, landfill usage
- Helps protect against loss from fire, flood, hurricane
- Proof of:
 - Major purchases (warranty, insurance)
 - Deductible expenses (IRS)
 - Utility bills, property taxes, building permits, investment track record, etc.
- You'll have everything available. All the time. Everywhere.

5 Benefits of Going Paperless

How do you do a "search" on this?



1. Reduces clutter...no more file cabinets & piles of paper
2. Saves time...find a document in under a minute
3. Privacy...is that file cabinet locked? What about the stack of paper?
4. Disaster proof...documents are easily lost to fire, flood, hurricane. But not if they're on your hard drive AND on cloud storage!
5. Easier access...if you can get to the web, you can get to your docs

Getting Started

- Key decision: if you want to verify every item on your credit card statement, you'll need to scan every document...more time consuming
 - Recommended: Just scan & store significant documents
- Do what you can to stop paper coming to you
 - Electronic bill payment
 - Get statements e-mailed (bank, investment, etc.)
 - Use an e-reader or your iPad
 - Put your lists, calendar, recipes online
 - Stop printing to paper..."print" to PDF, then store the document
- And then...get rid of the paper that you do get
 - Credit/debit card receipts, investment statements, etc.
 - How? Scan it, file the scanned image, and then recycle the paper

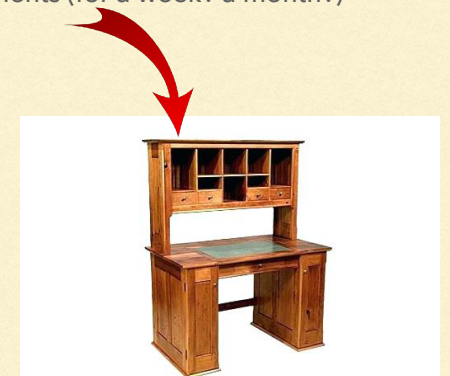
Don't Go Crazy...

- Don't get rid of important things like:
 - Property deeds
 - Birth certificates, marriage licence, love letters
 - Special permits, major contracts, etc.
- On the other hand, unless you're verifying every item on your credit card bills, you probably can toss receipts for:
 - groceries, gas, movie, parking
 - coffee, haircut, restaurant
- You won't need those for a refund, or for warranty...why keep a copy?

The IRS has accepted scanned receipts as far back as 1997

Summary of the Process

1. Save your important paper documents (for a week? a month?)
2. Separate and organize them
3. Scan them
 - In batches or alone
 - Name each document
 - Store each document
4. Make a secure backup copy
5. Shred & recycle your paper

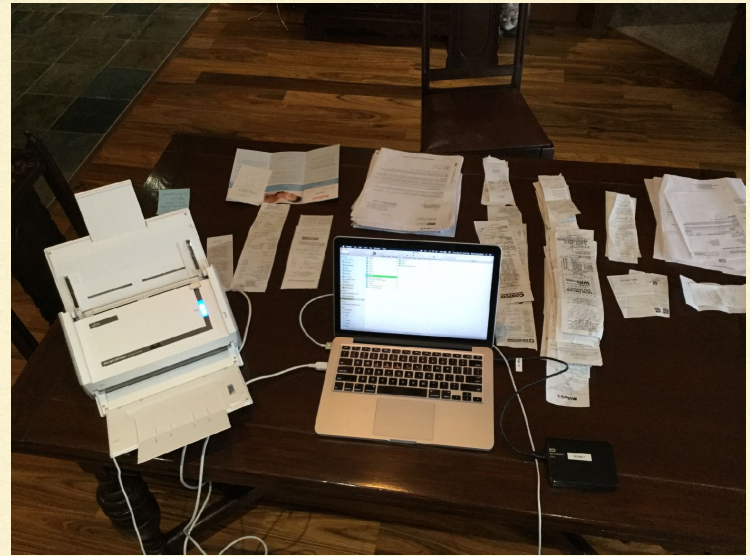


Organize your scanning session

- Separate paper month by month; separate credit & debit slips
- Separating by size (width) of paper will speed things up
 - By avoiding frequent adjustments to scanner input hopper width
- Group similar receipts (hardware; pharmacy; etc.)
 - Scan several similar receipts at once, perhaps a month's worth
- Scan all the same-width receipts consecutively
 - Several Macy's receipts?...all at once
- Major purchases one at a time
- For each scan:
 - Name the document
 - Specify destination folder



Ready to scan...



Tips

- Don't need to scan every day, or even every week
- Keep a folder...shove receipts etc. into it
 - Take the paper w/o the staple; and don't scrunch it up too much
- Spend ~1-2 hours each month
 - Less if you pre-organize the paper into specific piles
- The destination folder for scan 2 defaults to what you specified for scan 1
 - Save a lot of time by scanning all documents for that destination consecutively (...you will only have to name the document and click SAVE)
 - E.g. scan all Amex receipts consecutively

How should you organize the PDFs?

- Organize the scanned docs in a folder structure
 - By year
 - Then other categories (e.g. city, financial, insurance, cards, etc.)
 - Have a **document naming standard**
 - Mine: yyyy-mm-dd [doc type] [company name] [descriptor]
 - e.g. 2018-09-25 receipt Fidelity Insurance home warranty

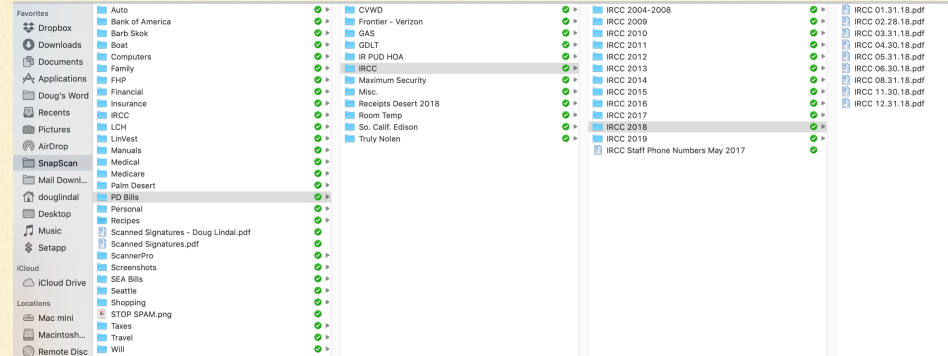
Example of My Folder Structure

2009	Canada	Financial	C.Crd-The Bay-5477
2010	USA	Calgary	C.Crd-Visa Allyson-1772
2011	Personal Docs	Shuswap	C.Crd-Visa joint-7419 or 0937
2012			C.Crd-WestJet Allyson-7261
2013			C.Crd-WestJet Rod-8523
2014			RBC Banking-2305 or 8889
2015			RBC Banking joint E-sav 09099
2016			RBC Investments
2017			Scotia Macleod
2018			TD & RBC Trust
2019			

Financial	Copperwood condo
Calgary	Insurance bills & docs
Shuswap	Property tax
	Utility bills & docs
	Vendor bills & docs

Financial	Insurance bills & docs
Calgary	Property tax
Shuswap	Utility bills & docs
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Doug's Folder Hierarchy



Document Management

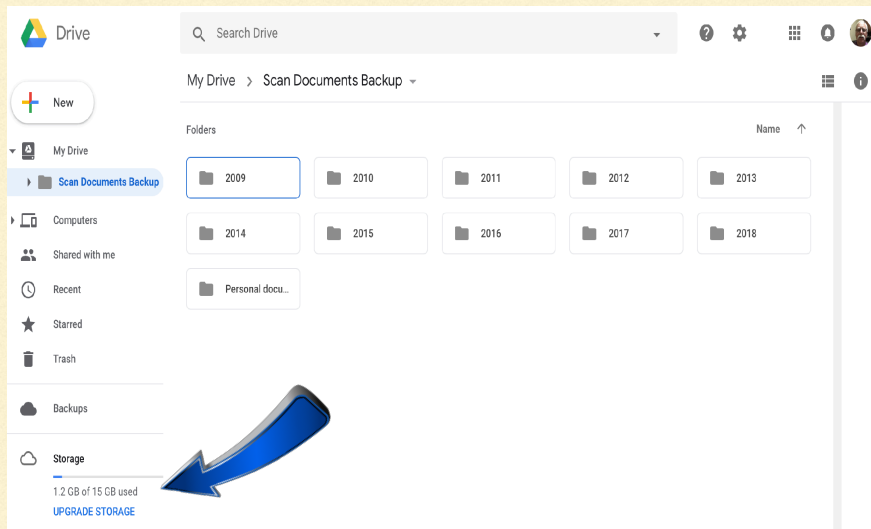
- Bundled software says it can help manage your documents
- My recommendation: don't do it. Use a well designed folder structure
- If the software company goes out of business, big trouble for you
 - e.g. Top photo management apps for Mac in 2015 were Ember, Lyn, Flickery, Unbound, Pixa
 - And where are they now...just 3½ years later? That's right...never heard of 'em!! Even iPhoto has changed drastically.
- My experience?...too much variety in the documents to utilize document recognition s/w
 - But I'm sure this area will see dramatic improvements
 - How about...snap a pic of the receipt with iPhone via a DocMgmt app, and it auto categorizes and stores the doc in the Cloud
 - e.g. ScanBot; 1tap – startups, but limited capability

Data – How much? Where to put it?

- Not a ton of data volume generated
 - About 250-300 MB per year for all documents (PDF)
 - Half of that if you toss the "small potatoes"
- So...8 years = 1-2 GB
- Could put on MacBook HD (mine = 500 GB)
 - I use an external 2 TB drive...size of a deck of cards
 - 32GB thumb drive, \$8 @ Best Buy, will store 100+ years of scanned docs!!
 - ...or an SD card
- How to share with spouse?...use Cloud backup
 - Google Drive 15 GB free; Dropbox 2 GB free
 - If you aren't going to have a backup, **DO NOT DO THIS!**



Backup...Mission Critical



The Scanner

- Fujitsu ScanSnap iX500 – great device, horrible software
- \$420 at Office Depot (cheaper than your phone...!)
 - **WARNING: Do NOT buy thru Amazon vendor Millechic for \$257...China-based scam**
- Scans in color; up to 25 ppm; up to 600 dpi
- 50 sheet auto-feeder
- Scans wirelessly to Mac, PC, iOS or Android
- Single or 2-sided scans – user selectable
- Automatically deletes blank pages
- Automatically flips upside-down pages; or rotates 90 degrees
- Will scan to a folder, Word, Excel, print, email, Google Drive, Dropbox, and many, many others

In my opinion, a real gem of a device!

My Scanner - Fujitsu ScanSnap iX500



PC Mag "Editors Choice" 2019

- Portable units
 - Epson DS-80W, \$169 at epson.com
- Desktop units with document feeders
 - HP ScanJet Pro 3000 s3, \$350 at amazon.com



Costco Option - Epson DS-410 \$279.99



Fujitsu's ScanSnap s/w Gets An "F"

- Recently upgraded from 32-bit to 64-bit
- They abandoned older scanners (e.g. S1500M...about 5-6 yrs. old)
- Changed user interface so you can't select a folder for each scan
 - Dump everything into 1 "home folder"
- And worst of all...you can use the scanner with 1 laptop, pay a licence fee for additional devices

- I tested a couple independent scanner s/w apps
- ExactSCAN was my choice...a bit pricey at \$80
 - Does everything Fujitsu's old s/w did, except auto-flip or rotate the upside-down or sideways pages (not a big deal at all)

How to scan with an iPhone or iPad

- Apple's App Store has dozens of Scanner Apps
- Three highly rated free Apps:

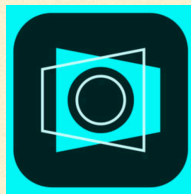
Genius Scan



Easy Scanner PDF



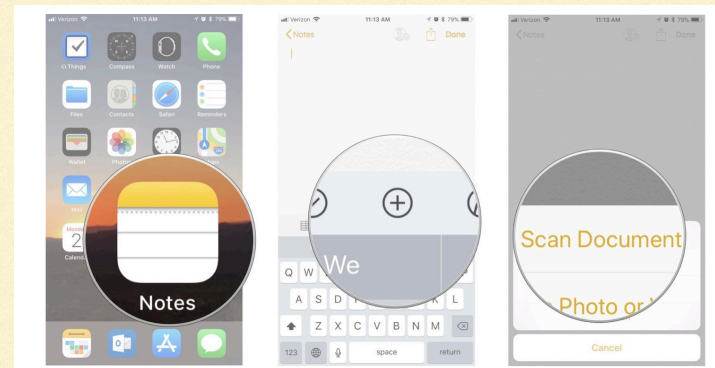
Adobe Scan



- Or just use Apple's own Notes App

How to scan with an iPhone or iPad

- Open Apple's Notes App
- Create a new Note
- Tap the More button just above the keyboard. It looks like a plus (+)
- Tap Scan Document from the list of options



How to scan with an iPhone or iPad

- Line up the document you want to scan with your phone's camera
- If it doesn't automatically scan, tap the shutter button to manually scan
- Repeat this step for each page you want to scan for a single document
- Tap Save when you've scanned all of the pages you want to include
- The scanned pages will populate in a new note in the Notes app



Indian Ridge
COUNTRY CLUB



Questions, Comments ???

Visit: rmug.weebly.com

to download this slideshow

Next meeting - Tuesday Feb. 12th 2:00PM