

A Quick-Start Guide

— *for* —

Going Paperless

(at home or in the office)

By Shawn Blanc and The Sweet Setup team. Enjoy!

thesweetsetup.com

About The Sweet Setup

Our goal is to help you make the most of your time and attention.

And we do this in all sorts of ways...

By spending our time researching the very best apps for your Mac, iPad, and iPhone.
And by write about tips and strategies for using those apps.

As a result, we know a lot about workflows, staying focused, and best practices. That's why we're visited by over half-a-million readers every single month.

In this guide we'll help you get control of your physical inbox of papers and de-clutter your workspace.

After working through this quick-start guide, you will have a clear idea of how to turn piles of papers into digital copies that can be organized and accessed from any device you own.

And then, you can celebrate by having a Shred Party to get rid of all those documents you no longer need to keep stored in filing cabinets, piles, bins, boxes, or wherever else.

Enjoy...

Shawn Blanc
Founder, The Sweet Setup



*“Don’t own so much clutter that you will be
relieved to see your house catch fire.”*

— Wendell Berry

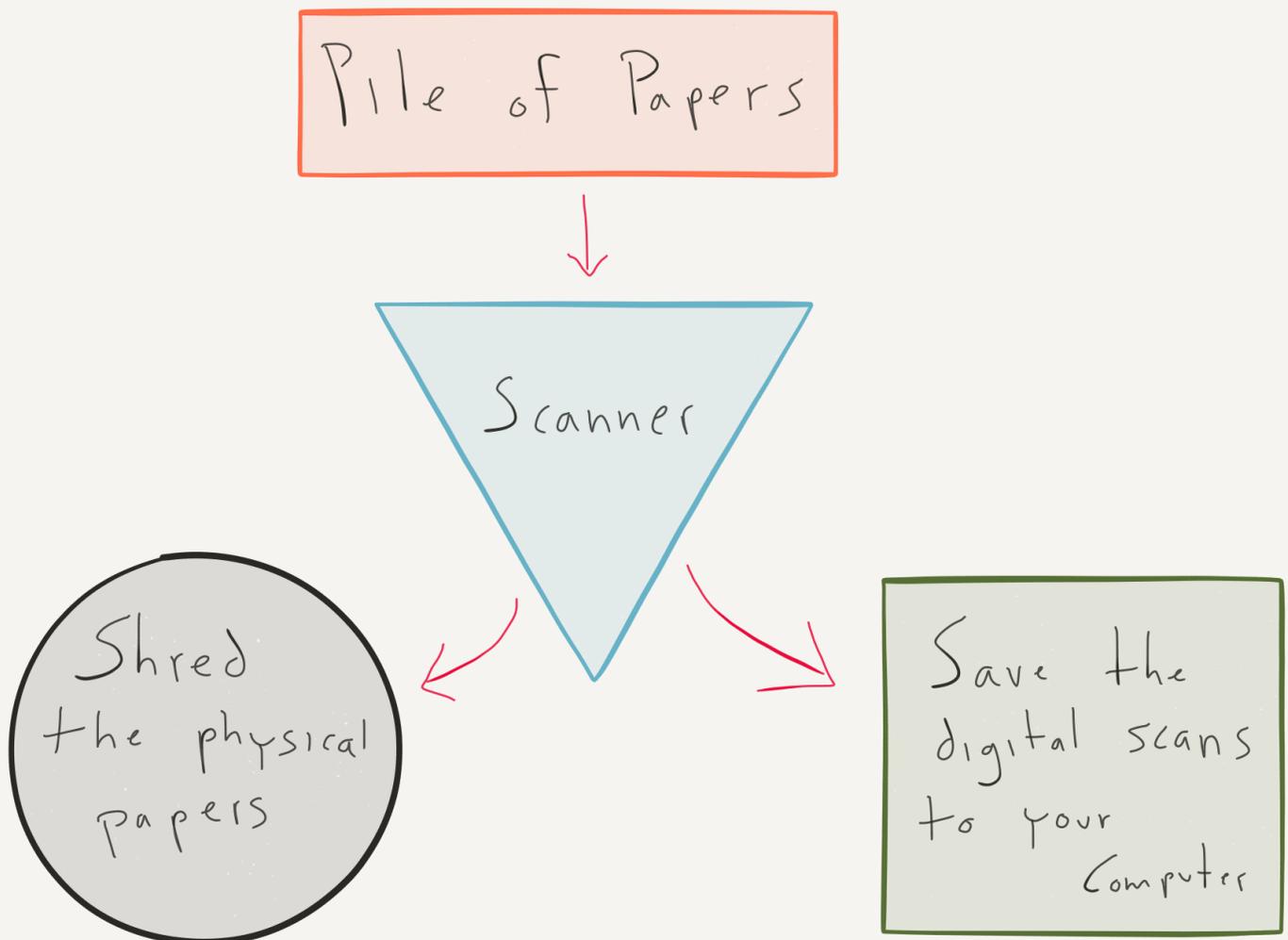
How to Use This Cheatsheet

The big-picture is simply this: (a) get a scanner; (b) get a shredder; (c) get started.

In short, you take your pile of papers and you scan them. Then, take all the physical papers that have been scanned and shred them (you don't need to bother with shredding papers that don't contain sensitive information). And then, lastly, save the digital scans to your computer.

We'll dive into more of the specifics on the following pages.

But first, here's a helpful flowchart...



Going “paperless” has a virtual cornucopia of advantages. For one, it’s a marvelous way to remove physical clutter. But more than that, once your paper documents have been scanned into your computer you’ll be able to access them easily (and from any device).

Turning your paper documents into digital files makes them easy to sort and search for (because with today’s technology, they can be scanned papers can be turned into computer-readable PDF documents).

Is going paperless easy? Why, yes. It simply comes to down to having the right tools and then building habits around digitizing your dead trees. Are you ready to leave paper behind?

We’ll help walk you through it...

Now, if you’ve got stacks and stacks of paper already, you’ve simply got to start somewhere.

We highly recommend you start by dividing things up into smaller projects. Don’t look at your 5 boxes of paper as one large project. Instead, break it up into more manageable chunks. Consider grabbing just a handful of papers every night after dinner and scanning them in. You’ll eventually get to all of it.

Once you get on top of your existing backlog, just keep at it. Don’t let piles of paper build up for weeks at a time. Decide on the frequency that you’ll process any new documents. Some of you may need to process things daily, while others may only need to process once per week (or even once per month).

Which Scanner Do You Need?

To start digitizing piles of paper, you're going to need a scanner.

If you have piles, boxes, and/or filing cabinet drawers worth of paper to scan, the best way is with a sheet-fed scanner. These types of scanners can handle a lot of documents easily and quickly. However, once you're done with the initial onset of scanning, the large sheet-fed scanners are probably going to be overkill.

So your options for getting started are to either borrow a friend's sheet-fed scanner, hire a service to help you, or buy a more compact single-page document scanner and slowly work your way through your backlog of paperwork. The latter option is time consuming, but if you tackle a little bit at a time, you will get it all done.

So, which scanner should you get? Here are a few that we recommend.

The Doxie Go Scanner (the one you probably should get)

The [Doxie Go](#) is a great scanner that I think most folks should get. At \$149, it's very affordable and is a compact and quality device.

The Doxie scanners are ideal for folks who don't deal with piles and piles of paper every single day. They're fast, well-made, and very affordable. I've been using one of the original models regularly since 2012 and it's fantastic.



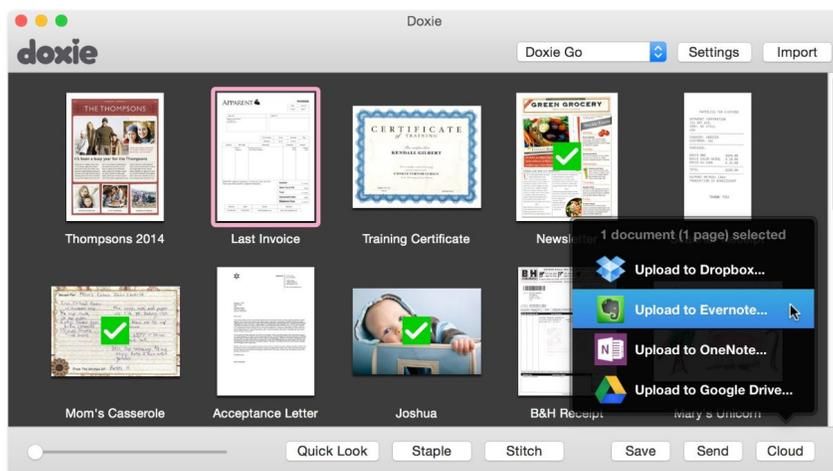
The Doxie One doesn't have to be plugged directly in to your computer in order to scan (just like a digital camera doesn't have to be plugged in to your computer in order to take photos).



This makes it extremely convenient around the office or at home. It's small enough you can keep it in a drawer or on a shelf — wherever is most convenient. It saves the scans to an included SD card.

You can then import your scans to your Mac. Or, if you want to import your scans to your iPad, you can do that too (using Apple's SD to Lightning adaptor). The Doxie can also hook up to a Mac with a USB connection if you want to bypass the SD card.

If you've ever dealt with bad scanner software in the past, guess what: it's not terrible anymore. It's actually fantastic. The Doxie app has OCR support and can sync your scans to Dropbox, Evernote, Google Drive, or OneNote. It also includes built in sharing to AirDrop or iMessage.



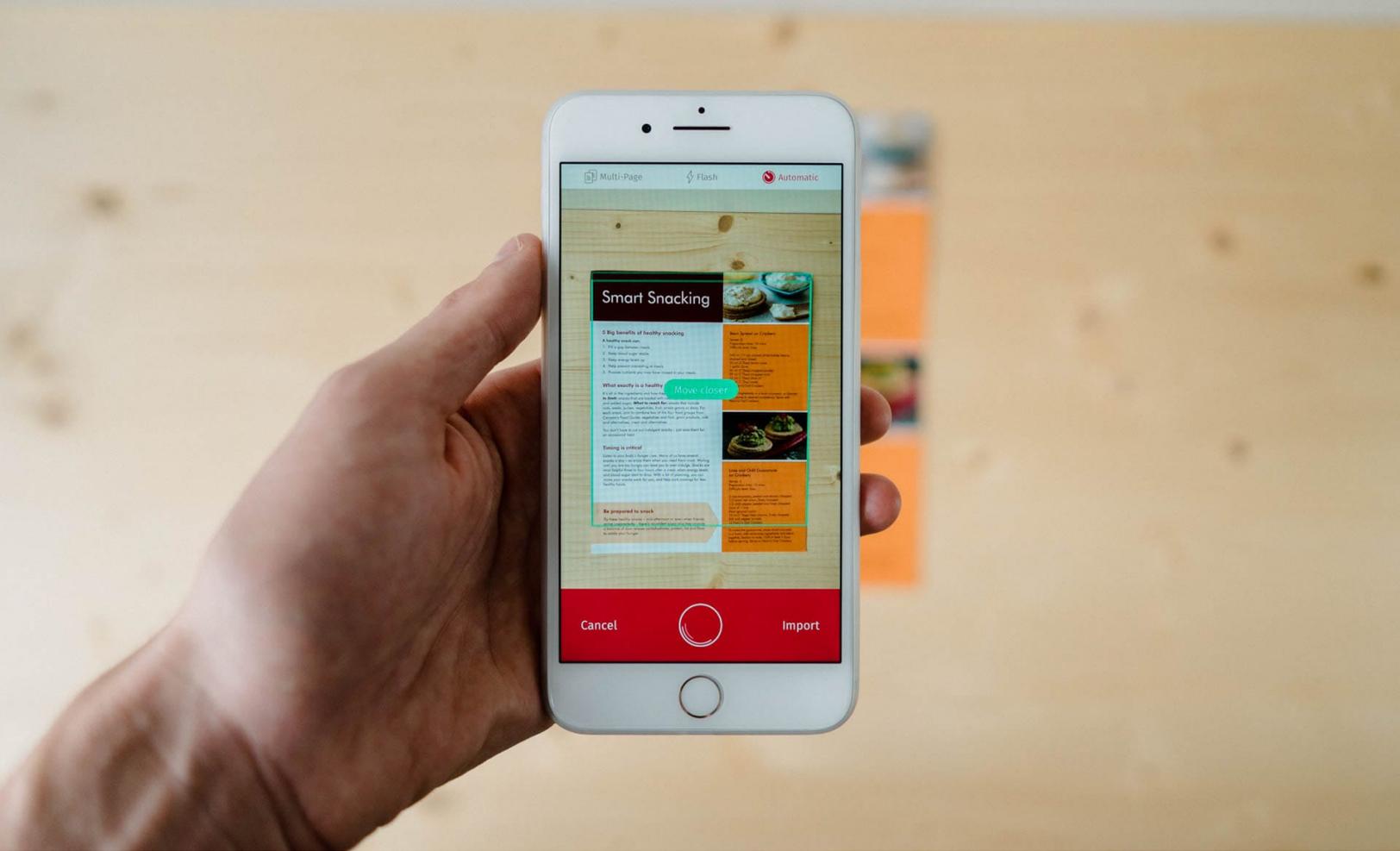
Fujitsu ScanSnap iX500 (for professional-grade scanning)

If you need to crunch through a lot of paper in a short amount of time, then want the [Fujitsu ScanSnap iX500](#).

The ScanSnap iX500 is widely regarded as the cream of the crop when it comes to processing a large stack of documents in a hurry. It's not cheap, but it's worth the price for those who need to go professional-grade. In short, this scanner can handle anything you can throw at it.

The ScanSnap connects to your devices via Wi-Fi (Mac or iOS) or via USB. Like the Doxie One, the iX500 supports direct scanning to many cloud services such as Evernote, Dropbox, Google Docs, Salesforce, and SugarSync. It can scan 25 pages per minute and has a 50 page automatic document feeder. It's advanced paper feeder system allows you to load up a mixture of documents, magazine clippings, and business cards into one scanning session.





iPhone and iPad Scanning apps

With the rise of the smartphone, we've now got incredible cameras in our pockets. While they certainly aren't as fast and powerful as a Doxie One or a Scansnap, they can certainly be convenient when you only have one or two receipts to scan and process.

Here are a few that we like:

Scanbot (our favorite iPhone scanning app)

[Scanbot](#) is free with \$5 in-app purchase that makes the app much more powerful and turns it into our favorite scanner. The in-app purchase will give Scanbot OCR support, smart file naming, basic editing features, and more.

With easy uploading to cloud services, it's a great choice for scanning documents from your iOS device and then saving them to Dropbox, etc.

PDFpen -- a great suite of apps

Smile Software's [PDFpen Scan+](#) (\$7, universal) was one the first apps to perform OCR on an iPhone without the use of the cloud for processing, and it does a great job.

Unfortunately, the process for scanning is hampered a bit by a slower multi-stage capture process. However, the biggest advantage PDFpen Scan+ has over Scanbot is that it is part of an entire ecosystem. [PDFpen](#) and [PDFpen Pro](#) run both on the Mac and [iOS](#).

Scanning a file is an entry point into these powerful PDF tools for editing PDFs, creating forms, and more. Scanbot is a great app, but PDFpen is a great *family* of apps. If that's important to you — and to many it is — give PDFpen a look.

Organizing and Software

If you remember from that super-awesome flowchart at the beginning, scanning is the first half of the battle. Once you get your documents digitized, what should you do with them? Modern computing gives us a lot of options.

As for organizing your files on your computer, I like to set up a logical folder and sub-folder organization structure. This digital folder structure could mimic the box or file-folder structure you already have with your physical paper documents, or it can be a new organization structure.

I personally use folders that start with the year, and then the type of document. Such as:

- 2017
 - Utility Bills
 - Medical Paperwork
 - Automotive
 - Tax-Deductible Receipts
 - House Paperwork
 - Miscellaneous

If that level of organization is too granular for you, then you could choose to organize your scans only by date or only by document type. For the former, it would look like putting *all* the scans for a particular month or year into the same folder. Or, for the latter, you could put *all* your utility bills into one folder for multiple years, etc.

Here's what's great about digital scanning and organizing. If you do want to have your computer organize your scans for you, there is a way to do that...

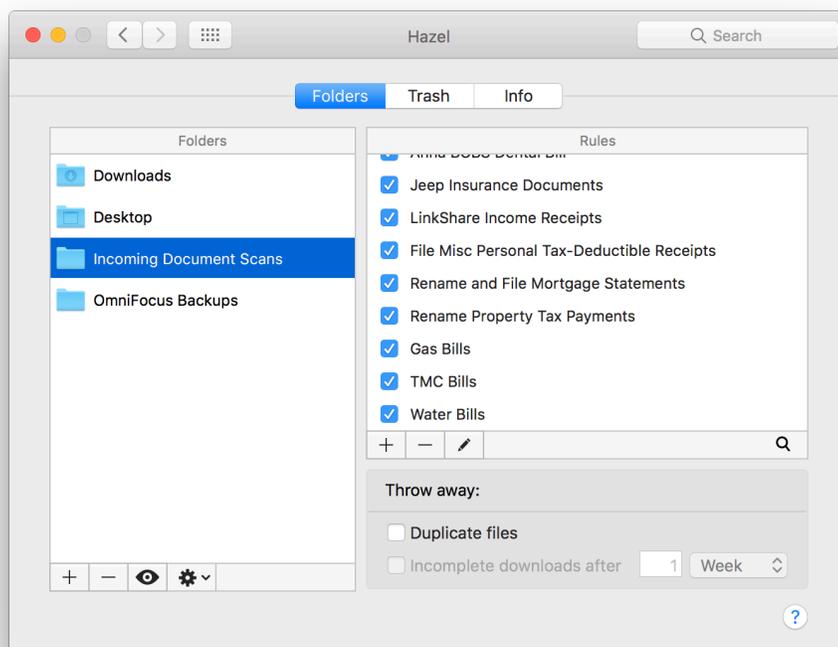
Because your scanning software will turn your scanned document into a searchable PDF (meaning your computer can read the words in the document), having a simple folder structure will make it more than easy enough to find the document you need if and when you need it.

There are ways to automate the naming and filing of incoming document scans, using an app called [Hazel](#)...

Hazel (for automatic document organization)

If you use a Mac, you should consider [Hazel](#) to be your Mac's personal organizer. Hazel runs in the background and watches for any tasks you've assigned to it. Thus, once it's been setup, you don't have to touch or think about it again.

To get Hazel working for you, start by save all your digitized documents into an "Incoming Scans" folder. Then, tell Hazel to watch this folder for specific types of documents. The documents we commonly deal with are things such as utility bills, health insurance documents, tax- deductible receipts, auto and home insurance statements, other financial statements, property tax receipts, etc.



A few of the rules I have set up in my Hazel. These rules can identify certain common documents I receive. And then automatically rename those scans and file them into the proper folders.

Most of these different types of documents can easily be identified by your unique account number with that company. And since the incoming documents that you've scanned are searchable by the computer, you can set up a rule in Hazel to look at the contents of a document, and then, depending on which criteria that document matches, have Hazel rename the PDF and file it into the proper folder on your Mac.

For example: if the contents of a document contain the words “Water” and the text string “5555abcXX” then Hazel knows it's your water utility bill. Thus, it can rename the document to “Water Utility Bill - 2017-01” and move it to your “Utility Bills” folder. Now digitizing and filing your papers is as simple as scanning them in and saving them. Hazel and your computer do the rest.

To sum up, once I've scanned in all my paper documents, I simply save them to my computer and then Hazel takes care of the rest. For the few documents that don't match any pre-defined criteria, or for which the OCR wasn't properly rendered, they simply are left in the “Incoming Scans” folder and I can manually deal with them.

I then shred what I've digitized (more on that in a minute).

Using Hazel makes it so easy to file away documents. It's a task which can be done almost mindlessly instead of having to remember where each type of document goes in my physical filing cabinet, looking for that file folder, and then stuffing the sheet of paper in.

Cloud Sync for Scanned Documents

If you want to be able to access your scanned files from any device, then you'll need to store them in either [Dropbox](#), [Google Drive](#), or [iCloud drive](#). Each of these cloud storage services will allow you to access your files from the web and your mobile devices (and even other computers, including Windows PCs).

Note to those who use Evernote, and want to learn more about combining Evernote with Hazel, check out [this article](#) over at Macworld. More on Evernote in a minute.

A Few More Tips & Tricks, Etc.

I don't know about you, but these days I get far more digital receipts and documents than I do physical ones. And so, going paperless actually has a scope beyond just the physical papers you scan and digitize.

From receipts in email, incoming PDFs from other folks, and the like, here are a few ideas and tips for how to wrangle those documents as well.

Convert Email to PDF on iOS

One of our biggest wish-list items for iOS would be that the Mail app would get access to the extensions share sheets. The task that we'd like to do most is convert an e-mail into a PDF so we can send it to Evernote. These will typically be receipts that we need to save for tax purposes.

Thankfully, a third-party service has stepped in to make this a possibility. [PDF convert.me](#) is a free service that allows you to forward emails to a special email address, and it will return a PDF copy of that email in return. The attachment will then have access to the iOS share sheet. There is no account to sign up for — just forward an email to pdfconvert@pdfconvert.me and wait for the return email.

Evernote

[Evernote](#) is a great tool for going paperless (though I personally do not use it).

Within Evernote, you can create notes and notebooks for your documents. The great thing about the notes based system is that you can store more than one document inside of a note. Evernote also has an incredible search function.

Evernote also includes a cloud based Optical Character Recognition (OCR) function. While I don't personally use Evernote, I know people who have found it to be very useful if someone sends you a PDF or image that doesn't have any OCR data. You don't have to remember to do this prior to loading it into Evernote. Once it's loaded, all the OCR data will be added in the background.

One of the best things about Evernote is that it's *_everywhere_*. They have apps for for pretty much all computing platforms. This means that Evernote works for you even if you have Android phone, an iPad, a Mac at home, and a PC at work. All of your notes, notebooks, and tags will be everywhere.

One of my most used features of Evernote is the ability to send anything into Evernote from any email client. This allows you to extend Evernote almost everywhere. Before you can send things to your Evernote account through email, you need to know what your unique Evernote upload email address is. Luckily, it's really easy to find that out.

In Evernote on the Mac, click your name in the top left corner and go to **Account Info**. Your unique address is listed on the next screen.

In Evernote for iOS, open **Settings > General** and look for **Evernote Email Address**.

Evernote also allows you to customize what notebook and tags are applied to the note prior to sending the email. Tags can be chosen by using **#Tag** and you can select a notebook by using **@Notebook Name**.

Digital Security

One reason some people don't go paperless is the fear of their digitized files getting hacked or discovered. One thing to remember is that your paper documents are only as secure as the locks on the door. Just because you can hold it in your hand, doesn't mean it can't be stolen. When it comes to digital security, there are a few tips we have:

1. Add a passcode to your important PDFs. Many of the apps we recommend support this. Apple's built in Preview app also supports adding a passcode (in the save screen).
2. Use 2-Factor authentication on any cloud service that you use for document storage. Here are reference guides for [iCloud](#), [Google](#), [Dropbox](#), and [Evernote](#) — all of which support it.
3. Enable [File Vault 2](#) on your Mac.

Shredders

Once your documents are digitized, don't keep the paper around. Shred it!

Because you're probably throwing away documents that include sensitive information, shredding those papers is critical. Not to mention, this is the fun part.

Not just any shredder will do. You want to get one that does cross-cutting (which greatly improves the security of your shredded documents), and you want to get one that will be easy to use on a regular basis.

For an affordable, high-quality shredder you should get [The AmazonBasics Shredder](#). It's a mere \$50 and ships for free. It has a 12-sheet shredding capacity, a 4.8 gallon bin, cross cut shreds, and it can chew through staples, CDs, and DVDs.

If you need more horsepower, check out the [Fellows Powershred 79Ci](#). It will chew through 13 pages at a time, has a 6 gallon bin that pulls out (rather than a motor which sits on top), an indicator light letting you know the capacity of the basket, and it claims to be extremely quiet and 100% jam proof.



The [AmazonBasics shredder](#) is well-reviewed, high quality, and costs just \$50.

Wrap Up

While we gave you a lot of information to get started, the short of it is this:

1. Get a scanner (the [Doxie Go](#))
2. Get a shredder (the [AmazonBasics](#))
3. Start scanning

My basic recommendation of the Doxie Go scanner and the AmazonBasics shredder will have you up and running for just \$199. Not a bad price to save yourself time while also clearing your office (and your mind) of all that paper clutter.

Thanks for reading, and happy shredding!

— Shawn

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