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# Paperless 411

Friday, November 2, 2007

## Making your Small Office Paperless

### Going paperless an absolute beginners guide.

Without preamble or further ado ...

#### Bills and Statements

Subscribe to get your bills and statements by email. This can reduce a lot of paper coming in the door and save you the bother of having to scan it. If you get a lot of email (who doesn't) it's really easy to miss a bill and forget to pay it. I recommend getting a separate email account specially for these.

#### Scanners

You've probably got a lot of paper already and there will be more coming in the mail tomorrow. You need a scanner. You need to get one with an automatic feeder *and* a flatbed. You'll need the flatbed for scanning receipts. Make sure it does at *least* 15 pages per minute. It doesn't matter how few documents you have you won't have the patience to watch anything slower and you'll just give up on it. If you have the budget for it I would recommend a duplex scanner. This will scan both sides of a page in one pass. You may not have many double-sided documents but its really fiddly to try scan two-sided documents by loading them twice on the scanner.

**Tip:** Scanner manufacturers give their speed rating based on Black-and-White scanning at 200 dpi. If you scan in greyscale it *will* be slower.

Unfortunately some scanners are a bit slower and others are a *lot* slower.

**Tip:** The quality of the sheet-feeder is more important than the raw speed of the scanner. If the feeder occasionally double-feeds then you will never be sure that you didn't miss a page and your throughput will be lowered to the speed that you can count pages. Scanners with a straight-through paper path tend to be more reliable. Some scanners have a rubber "tongue" that holds the sheets in place and prevents mis-feeding. I would recommend that you see a scanner in action before you buy it.

#### Scanning Software

Many scanners come with free scanning software. Make sure that it will produce PDF documents. PDF is the most universal format for documents. There are 3 main types of PDF documents.

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## About Me



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Founder of Beyond  
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**MightyFile** Searchable Document Solution.

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- Image-Only. Shows an image of each page. The text is not searchable.
- Image-on-Text. Shows an image of each page. However it also stores the text and it can be searched using search tools.
- Text-Only. Each page is composed of just text. (A bit like a read-only Word document).

You should only consider scanning your documents as Image-Only or Image-on-Text. These formats show an accurate representation of the original document and will be suitable for Tax purposes etc. The PDF format belongs to Adobe, however it is an open-format and you can buy software from many vendors to create or modify PDF documents. You can view documents using the free Adobe Reader.

### **More notes on Scanning**

Scan your documents as greyscale. While greyscale is slower than Black-and-White it has the advantage that it will capture all of the text and images on your documents. A lot of documents are in color these days. When you scan these in B&W the light colors will disappear completely. Color scans are far too big and your scanner will be very slow.

I recommend scanning at 300 dpi (dots per inch). This will give good image quality even if you view at large magnification. You only scan once but you will keep the document for many years. 300 dpi will also give you better results if you are using Optical Character Recognition (OCR) to produce Image-on-Text documents. Even if you don't do OCR today you could still use software later to convert your Image-Only PDF documents into Image-On-Text PDF documents.

### **Filing Your Documents**

Create folders for each of your suppliers, customers, banks etc. Under each folder I usually create folders for 'Correspondence', 'Invoices', 'Checks' and 'Contracts'. Place your documents in the folders exactly as you would in a paper filing system.

Always name your documents. Even if you are creating searchable documents you should give each document a meaningful name. It's really unhelpful to open a folder and see 50 documents titled doc\_01.pdf, doc\_02.pdf. You'll have to open a lot of documents to find what you are looking for.

**Tip:** Prefix all of your document names with the date in yyyyymmdd format. e.g. 20070922-cable bill.pdf. If you do this you will always be able to identify the date correctly. Using the windows file dates is not a good idea because you may not scan the document exactly when you got it or in the order that you received it. This method ensures that your documents will always sort correctly. You will avoid getting Jan 2001, Jan 2002 followed by Feb 2001, Feb 2002 etc.

### **Finding your Documents**

You can use Microsoft desktop search or Google desktop search to find your documents. If you create Image-Only PDF documents you will only be able to search by the name of the file. So file naming discipline is really important. If you create Image-On-Text

documents you will be able to find your documents by any words that are contained in them. If you have created Image-On-Text documents and you can't search by the document content then you may need to install a special filter for PDF files. This is called an iFilter for Microsoft Search and is called the PDFtoText utility for Google Desktop.

**Tip:** The indexing (search) service on windows XP is not installed by default. You'll need to go to "Control Panel"=>"Add or Remove Programs"=>"Add/Remove Windows Components" to enable it.

### **Backing up your Documents**

Now that you have your documents stored on your computer you must back them up regularly. An external USB hard disk is a good way to do this. Make sure that you have two of them and keep one of them at another location (or at least in a fire-safe). If you do use two drives make sure that you do complete (not incremental) backups on each drive. USB drives tend to overheat so turn them off when you are finished backing up your data.

### **Postamble**

For all businesses and many individuals going paperless is really worthwhile. Once you've got yourself set up it is actually less work to file and organize your records. You'll rest easy knowing that you have everything and that you can find it. If you're using full-text search you will be amazed at how well it works. It can truly transform your business.

This guide is just enough to get you started on your paperless journey.

*Posted by Tim Stapleton at 7:46 PM 0 comments*

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