TAKE CONTROL OF YOUR PAPERLESS OFFICE

by JOE KISSELL

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This book guides you in the process of eliminating paper clutter, replacing many printed documents with digital versions—with special emphasis on the Mac-compatible hardware, software, and process needed to efficiently scan documents and create searchable PDFs. It also helps you find clever ways to reduce incoming and outgoing office paper, and capture documents even when no scanner is available.

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Basics

Here are a few “rules of the road” that will help you read this book:

• **Links:** All blue text in this ebook is *hot*, meaning you can click (or tap) it, just like a link on the Web. When you follow a link to a different part of the ebook, you can return quickly to where you were by using your ebook reader’s “back” feature, if offered. For example, if you use iBooks in iOS to read the EPUB version of this ebook, you can tap the “Back to” link at the lower left of the screen. Or, if you use Preview on a Mac to read the PDF version, you can choose Go > Back or press Command-[.

• **Menus:** Where I describe choosing a command from a menu in the menu bar, I use an abbreviated description. For example, the abbreviated description for the menu command that creates a new folder in the Finder is “File > New Folder.”

• **Contextual menus:** *Contextual* menus appear when you Control-click various elements on a Macintosh screen, including Dock items and files in Finder windows. To describe opening a contextual menu, I tell you to right-click (Control-click) an item on the screen. Control-clicking always works, but if your mouse offers a right-click option, or if you use a trackpad or other means of opening a contextual menu, you should feel free to use the method you prefer.

• **Finding System Preferences:** I sometimes refer to settings in System Preferences that you may want to adjust. To open System Preferences, click its icon in the Dock or choose Apple  > System Preferences. When the System Preferences window opens, click the icon of the pane whose settings you want to adjust.
• **Path syntax:** This book occasionally uses a *path* to show the location of a file or folder in your file system. For example, Mac OS X stores most utilities, such as Terminal, in the Utilities folder. The path to Terminal is: `/Applications/Utilities/Terminal`.

The slash at the start of the path tells you to begin at the top level of the disk. Some paths begin with ~ (tilde), which is a shortcut for the current user's home directory. For example, if the person currently logged in has the username `joe` and wants to install fonts that only he can access, he would put them in `~/Library/Fonts`, which is just another way of writing `/Users/joe/Library/Fonts`.

• **User Library:** The library folder mentioned in the previous paragraph, `~/Library`, is normally invisible in Mac OS X 10.7 Lion and later. To see it in the Finder, hold down the Option key and choose Go > Library.

• **Desktop vs. mobile:** For the purpose of this book, a *desktop computer* is a computer running a conventional operating system such as Mac OS X or Windows. A *mobile device* is a smartphone, tablet, e-reader, or other handheld computer-like device, such as an iPhone, iPad, Kindle, or BlackBerry.

• **Mac OS X code names:** I sometimes mention features specific to particular versions of Mac OS X, which Apple normally refers to by their code names (which were big cats up through 10.8):
  
  ‣ Mavericks: 10.9
  ‣ Mountain Lion: 10.8
  ‣ Lion: 10.7
  ‣ Snow Leopard: 10.6
What’s New in the Second Edition

It’s been two years since the last update to this book. Although my basic strategy for running a paperless office hasn’t changed much in that time, significant changes have occurred in the hardware, software, and online tools available. In addition, numerous readers have made suggestions, asked questions, and proposed additional topics. This heavily revised second edition attempts to address as many of those things as possible.

The major changes in this edition are these:

- Added a chapter for people who have already taken steps toward a paperless office and want to know what they should take a fresh look at; see Reassess Your Paperless Office Strategy
- Included a sidebar about creating editable Word documents from scanned images; see Converting Scans to Microsoft Word Format
- Updated Consider Storage Options to cover the latest interfaces and cloud storage options, as well as SSDs
- Added new services in Sign Up for Paperless Billing that can fetch PDF statements for you and listed more options in the sidebar Other Electronic Payment Options
- Expanded Explore Other Paperless Options and Get Paperless Postal Mail to include additional services, including several for Canadian residents
- Revised my advice about multifunction devices in Learn Why Document Scanners Are Different
- Heavily rewrote instructions for how to Pick a Mac-compatible Scanner and Choose OCR Software, and, in the process, moved numerous details into online appendixes
- Reorganized and expanded the information about configuring scanner settings, with much more detail about how to achieve optimal results; see Choose Your Main Scanning Options
• Updated the sidebar ScanSnap Manager and OCR to cover the latest version of Fujitsu’s software

• Significantly revised Set OCR Options to include additional important settings and considerations

• Expanded Use a Document Manager to discuss further features, such as syncing and sharing

• Updated the Automate OCR topic and (to a lesser extent) the AppleScripts that accompany it

• Thoroughly updated Pick an iOS Scanning App and Use Other Smartphones to reflect current offerings
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 a couple dozen 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 Retina displays on my iPad, iPhone, and MacBook Pro. I like the fact that I can search, annotate, and back up my books now, and that I can accumulate as many as I want without running out of shelf space, as often occurs in my home.

But I truly 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—and 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 of it 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, which I tend to do every few years or so. 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 ebook, I explain how you can do what I do when it comes to paper. By carefully 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 offers some interesting perspective in *The Straight Dope.*

What I describe here is a multi-pronged approach to strategically eliminating paper. Of course, even if you avoid generating your own paper clutter and reduce the paper other people send you, some paper will still find its way to you—and you may have many thousands of pages already sitting around. So one of the central features of the plan I discuss is scanning your paper documents and processing them in a way that retains their physical appearance while also letting you index, search, select, and copy their text. I also talk about using devices such as the iPad, iPhone, and Kindle (and even digital cameras) to maximum advantage—and 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 somehow 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 plan I cover in this book is appropriate for a home office or small business. If you aspire to take a large corporation paperless, I applaud you—but that sort of project is beyond the scope of this ebook.

I also assume that you have at least one Mac at your disposal. While everything I discuss can be accomplished in a comparable fashion with other operating systems, in this ebook I focus on Mac-compatible hardware and software.
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 any case, I urge you to start with Meet Your New Paperless Office, which provides useful background information.

**Take preliminary steps:**
- If you read the first edition 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.
- Learn what features you need in Mac software to accompany your scanner in Choose OCR Software.
- Configure Your Software for optimal efficiency and quality.
- Figure out the most convenient way to process papers you receive in Create a Workflow for Incoming Paper.
- Devise a plan to scan all those 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 yourself:

• Learn how to break the printing habit painlessly (at least sometimes) in Avoid Common Printing Needs.

• Discover 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 the best way to proceed.

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 want to begin with a brief “state of the union” look at what has changed in the last couple of years (as I write this in mid-2013), 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 last time this book was updated, a number of things have changed that might affect the way you approach the paperless office. Here are some of the things that continue to change over time.

Scanners Get Even Better

The desktop and portable scanners you could buy two (or even five) years ago were pretty good, but the latest crop is even better. For example, Fujitsu’s ScanSnap iX500 is faster than its predecessor, with less tendency to misfeed—and with new capabilities, such as using Wi-Fi to scan directly to an iOS device. Doxie has a couple of newer models...
too, including one with Wi-Fi that can scan directly to cloud-based services without an intermediate computer. And several multifunction (print/scan/fax/copy) devices have appeared that, in contrast to earlier models, work well as document scanners.

**Retina Displays Multiply**

When the first edition of this book was published, Apple had only one product with a high-resolution Retina display: the iPhone 4. Since then, newer iPhone models, multiple versions of the iPad, and some MacBook Pro models have been upgraded with Retina displays; it’s surely only a matter of time until all Apple devices have them. (Most of Apple’s competitors are also moving to ultra-high-resolution displays, often known by the term HiDPI.)

For people switching away from paper, this is fantastic news, because it means documents that you view on screen can be just as crisp and readable as those on paper.

**iPad Cameras Improve**

iPads not only have better displays these days; they have better cameras too. Whereas the camera on the iPad 2 had a resolution too low to be usable for OCR, all newer models (including the iPad mini) have rear-facing cameras that produce excellent results when “scanning” paper. That, in turn, ties into the next item: better software.

**OCR Software Choices Expand**

In the last edition of this book, I listed more than 20 Mac apps that can perform OCR, as well as several iOS apps. I’m happy to say that today, there are even more choices in both categories. And on iOS, the quality and features of scanning apps have been steadily improving, to the point that they offer results nearly as impressive as what you can achieve with a Mac or PC.

Another interesting trend is software that can optionally send scanned images to human beings for verification and correction of the recognized text, especially for handwritten documents. NeatVerify and Shoeboxed, both discussed later in Outsource Scanning, are examples.
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 will you have to give up—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

If you’re reading this ebook, 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. But, in fact, a paperless office can solve many problems simultaneously—including some you didn’t even realize you had! Let’s look 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 Mac 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 you encounter? (How about this: It took me about 2 minutes to determine that my father got an F on his final French exam in 11th grade. I scanned all his old report cards!)

• **Share documents easily.** Printing or photocopying documents—and then handing them 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 that I’m as concerned about the environment as the next guy, but my desire to reduce paper consumption has nothing to do with saving trees, eliminating waste, shrinking my carbon footprint, or any such thing—although it 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.

**Tip:** To keep up with the latest in the world of paperless office news, visit Brooks Duncan’s [DocumentSnap](#) site or subscribe to his blog.
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 and colleges, tax offices, and other entities that expect money from you on a recurring basis offer some form of paperless billing and payment. In fact, 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 by credit card or by preauthorized bank withdrawal.

I’m a big fan of paperless billing, and I use it as much as possible. Without it, I have to contend with a paper check (and frequent checkbook refills), a payment stub, a stamp (often), and a return envelope. And after all that, I still have an outer envelope (into the recycling bin) and a paper bill I’ll probably never look at again (into 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 require an exchange of paper, and see if 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 such an overloaded Inbox, or a flaky spam filter, that you’re likely to miss emailed payment notices, you might want to think twice. Also, you might want to read my *Macworld* article *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—if you’re on vacation, sick, or otherwise incapacitated. Does your spouse or significant other have a reliable way to check and pay your bills? If not, talk it over and devise a plan before committing yourself.

  **Tip:** You’re less likely to miss billing notices if you set up a special email address that you 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 in 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 ether(net), might cause a notice not to arrive, or an alarm not to sound. If you depend utterly on something being “in your face” to remind you about important payments, take the occasional failings of technology into account.
Choose a Document Scanner

Although the suggestions in the previous chapter should help you to cut down on the volume of paper that comes into your life, they won’t stop it altogether—and they won’t eliminate all the paper you’ve already accumulated, either. So we move on to the next phase, which is 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. But if time is money, then you’ll recoup your investment many times over.

Learn Why Document Scanners Are Different

Around 2001, when I first realized that I wanted a paperless office, I bought a scanner that, according to my research at the time, should have been just the ticket. It was a high-resolution flatbed scanner (the kind typically used for scanning photographs) that came with an automatic document feeder (ADF) attachment, so I could lay a stack of papers in the tray, push the button, and—in theory—end up with scanned copies of them a few minutes later. But after trying this a few times, I got so frustrated that I gave up entirely. I want you to avoid making the same mistake, so let me explain the problems with my earlier setup:

• **My scanner was sloooooow.** Admittedly, everything was slower in those days, and it wasn’t the most powerful scanner money could
buy. But even at lower resolutions, scanning a single page could take minutes, and that was far too long. Part of the reason for this was that the scanner was designed for precision and fidelity—fantastic for photographs, but overkill for text documents.

- **It didn’t do duplex scans.** The design of the scanner and ADF was such that it could scan only one side of a page at a time. For double-sided documents (as many of mine were), I had to scan one side of all the pages, flip over the stack, scan again, and then laboriously sort the images into the correct order. Yuck!

- **It had no OCR capability.** Because the scanner was designed mainly for photographs, it didn’t include OCR software of its own, and I couldn’t find an affordable third-party OCR package at the time.

- **It required a lot of fiddling.** I had to put a lot of thought and effort into selecting the right combination of settings for each document—the scanner wasn’t smart enough to figure out whether a page was color or black-and-white, what size it was, how to straighten it if it was crooked, and so on. It took a lot of extra manual effort to process the scanned files.

So that experiment was a bust, but I learned a lesson: for document scanning, what you need is a document scanner—a device that’s designed expressly for that task. And most flatbeds—even newer, faster ones with duplex ADF capabilities—are not the best tool for the job. (I’m not knocking flatbeds, by the way. They’re fantastic for scanning photos, books, and large or irregular papers. But if you need to plow through thousands of letter/A4-sized sheets of mostly text, not so much.)

Typical desktop document scanners look somewhat like fax machines: you load the pages to be scanned in the top, and the scanner pulls them through quickly (often at a pace of 20 pages or more per minute), scanning both sides at once. (Compare this with duplex 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.)
Choose OCR Software

One way or another, you need software to turn your raw scans into searchable PDFs. OCR software of some sort most likely came with your scanner, but if it didn’t—or if you’re not happy with its features or accuracy—you have oodles of other choices. This chapter provides an overview of major factors to consider when choosing Mac-compatible OCR software, along with a few specific suggestions for software to try (or avoid).

Determine Your Needs

I haven’t personally tried every scanner and every OCR application out there, but I’m going to go out on a limb and suggest that almost any combination of scanner and software can be made to yield acceptable results for most users. If you don’t want to agonize over the decision, the path of least resistance is simply to use whatever software came with your scanner.

However, you may be the sort of person who should look more deeply into the capabilities of OCR tools before jumping in if any of the following statements apply to you:

- **You have (or plan to get) a Doxie.** As of publication time, the original Doxie is the sole scanner, of those mentioned in this ebook, that doesn’t include any OCR software of its own. (Newer models, including the Doxie Go and Doxie One, do include OCR software.)

- **You need to scan in multiple languages.** All the OCR programs that I discuss here support English text, and most support at least a few other languages too. If you have documents in more than one language (and especially if your documents mix more than one language on a page), you’ll want OCR software that supports those languages, as I discuss in the next topic.
• **You want capabilities your existing OCR software lacks.** Perhaps you’ve tried the software that came with your scanner and found it to be too slow, too cumbersome to use, or missing features you wish it had. If so, by all means look for a replacement!

• **You need more-advanced PDF processing features.** Some of the OCR programs here do nothing but spit out a searchable PDF file, whereas others let you manipulate PDFs to your heart’s content. If you want fine-grained control over your searchable PDFs, look for such a program.

If you have none of those needs, feel free to skip to the next chapter, *Configure Your Software*. Otherwise, continue reading to learn about features to consider when evaluating OCR software.

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**Consider Important OCR Features**

Comparing OCR applications for Mac OS X is less of a science than an art—and a messy one at that. The information available on developers’ Web sites varies tremendously in scope and detail. Some have elaborate user manuals, while others include only a brief how-to guide. Many offer downloadable demo versions, but some don’t. Developers use different terms to describe the same features, and have wildly divergent ideas about what constitutes a nicely usable interface. A feature that one developer considers too obvious to mention may be a main selling point for another. And although most of these applications claim to have outstanding OCR accuracy, objective measurements are notoriously difficult to come by.

In short, it’s harder than one might expect to evaluate OCR software without trying it out (and even then, results may be ambiguous). However, a few factors are worth looking for:

• **Accuracy:** No OCR software is 100 percent accurate, but, it’s been a long time since I used OCR software that didn’t come close enough to meet my basic searching and archiving needs. (Remember, if all you need to do with your PDFs is search them, occasional OCR mistakes won’t affect your results much.)
Configure Your Software

The best OCR software in the world can still 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. I also show you several ways to automate scanning so that it takes as little manual effort as possible, and provide guidance about how to file your scanned documents so you can find and use them quickly in the future.

Understand the Scanning Process

The fact that your scanner includes OCR software, or that you’ve purchased such software separately, doesn’t necessarily mean that the process of creating a searchable PDF from a scanned document will be straightforward. It might be, but more often than not, it’s necessary to think through a multi-stage process, which may involve configuring the settings in two or more pieces of software.

Every scanner comes with customized software that handles the low-level communication between the scanner and your computer. For example, if you have a Fujitsu ScanSnap, the scanner-specific software is called ScanSnap Manager; with a Canon imageFORMULA scanner you’d use Canon CaptureOnTouch; with an Epson scanner it would be Epson Scan; 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 hard disk. As a result, this software always provides some means of setting preferences such as resolution, destination, and file format. The scanner’s software 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.

If you were scanning photos, then the bitmap image would be all that you’d need. But for scanned documents, an additional step is generally
necessary (the bottom row in Figure 1)—another piece of software opens the bitmap image, performs OCR on it, and generates a searchable PDF file.

![Diagram of the process: Scanner -> Scanner Software -> Bitmap Image -> OCR Software -> Searchable PDF]

**Figure 1:** Produce searchable PDFs from paper documents with as little manual effort as possible—ideally, no more than a single button press.

Since you want to avoid manual effort whenever you scan, you may feel some concern about the fact that two or more applications may be involved. Fortunately, the process has several potential shortcuts:

- Some scanner software has built-in OCR capabilities, so you can skip the second application and go straight from scanner to searchable PDF without saving an intermediate bitmap file. Similarly, some document management software can do OCR, so you can pass it a bitmap image and let it do the rest.

- Most scanner software gives you the option to send bitmaps directly to an OCR (or other) application, so even though the file is saved somewhere on disk in the process, you need not do anything with it yourself.
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. But to make your life even easier, you should take a moment to think through the physical path papers will take from the time they enter your office to the time they leave it (or get filed)—and 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 you can dispose of.

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, and many (including myself) who 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 papers, 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 if it’s an actual box, a plastic or metal tray, a wall-mounted paper holder, a file folder, or a taped-off corner of your desk. However you want to think of a box, make sure you can clearly designate multiple geographical areas of at least 8.5 x 11 x 2 inches each to special uses.

Think about the traditional idea of an In box and an Out box—that is, two trays sitting on a desk, one for incoming correspondence and one 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 into 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, 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 disposing of its contents.

Such a setup may be adequate for people who receive relatively few pieces of paper and who 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—not for any specific reason, but 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'll 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 the 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 thing. Everyone’s different, but I can offer some general words of advice about pruning:

- **Start with the low-hanging fruit.** You know you can get rid of old junk mail, printouts of documents you have in digital form,
duplicates, unused reply envelopes, and numerous other items, so take an initial pass and toss the easy stuff.

- **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 3–7 years, depending on the type of document. Fine, but if (like me) you’ve saved every receipt and cancelled check back to the mid-1980s, 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 informative document [Recordkeeping for Individuals](#). 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. 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; if they might come in handy when writing your memoirs; or if you want to be able to show them to your grandchildren in physical form, then by all means keep them!

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**Prioritize What’s Left**

If you’re left with more papers than you can comfortably scan in a week or so, it’s crucial to prioritize them. You could get interrupted, distracted, or delayed, and the project of scanning everything might drag on for longer than you imagined. So scan things in order of importance.
Perhaps you bought a portable scanner (see Portable Scanners) to take with you 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 built into your iPhone, 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 Pocket-sized 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 software. 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, the advantages to such apps are enormous.

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**Pick an iOS Scanning App**

In my household, all the mobile data gadgets are made by Apple, so I’m most familiar with apps that run under iOS. And there are hundreds upon hundreds of iOS apps that offer mobile 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 on both iPhones and iPads; others are iPhone-only. 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.

**Note:** For capturing documents, especially at close range, you’ll get the best results with an iPhone 4, fifth-generation iPod touch, iPad 3, or newer models in any of these lines. These products’ sensors have a high resolution and reasonably good low-light performance; the iPhone is arguably the best choice in that it also has an LED “flash.”

Although I can’t begin to do justice to the huge range of iOS apps in this category, here are a few representative examples out of many hundreds, divided into broad groups.
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 Command-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: 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 out simply to put in a folder or filing cabinet get an F; things you print out because you need to read them on the plane, or mark them up with comments, or otherwise review them, get an R; and things you print...
because you have to give or send 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 to cut back accordingly. But you may be able to go further. You’re looking to eliminate as many of the “F” and “R” items as you can. I hope I’ve persuaded you in the course of this book that digital copies of files (which you already have, since you printed them) 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...

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**Review and Annotate Documents**

If you’ve spent years editing documents by hand, on paper, 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 Mac applications that can open PDFs—including Preview (included with Mac OS X), PDFpen, DEVONthink, and Acrobat Pro, among others—can also *annotate* them. Annotations are markings and notes that appear on a transparent “layer” above the document itself. Annotations don’t alter the contents of the document, but they do add lines, shapes, sticky notes, comments, and in some cases traditional copyediting marks. You can even use annotations to highlight text, in much the same way you could with a pen and highlighter. But, on
When a document requires a signature, it’s natural to assume that it requires ink on paper. And 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 scanned copy of your signature. Likewise, it’s possible to collect someone else’s handwritten signature on the go, typically using an iPad or other mobile device.

There’s also 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, simply 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 only happy to oblige. (And, as I explain shortly, you can send a fax by email, so it amounts to the same thing.) In cases where only an original signature is accepted, I send a piece of paper,
but in my recent experience that happens mainly in cases 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 lease, bank loan,
or affidavit, 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 on faxes that appear to have been added digitally. 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.

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**Scan Your Signature**

To be able to fax or email signed documents without generating more
paper, the first thing you need is a good digital copy of your 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.

2. Scan the page with your signature. 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.

3. In your favorite image editing program (such as Preview, Photoshop
Elements, or GraphicConverter), open the scanned image, crop it
so that only a few pixels of white appear around the outside, and
confirm that the white truly is white. (If it’s gray, or speckled, or
otherwise “noisy,” adjust the contrast or brightness, or use whatever
other tools your image editor provides to eliminate the noise.)
You may think of fax as an outmoded technology that was 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, then that’s an extra monthly expense. Who needs all that bother?

Since you’re a Mac user, you have (at least) two excellent ways to receive faxes without having an extra box on your desk, and without generating extra paper. I’ll tell you about my favorite method first—the fax-to-email gateway—and then say a few words about using a modem.

Note: I’m deliberately omitting multifunction devices (which combine printer, scanner, copier, and fax machine) from this discussion, because most of the arguments against using a stand-alone machine for receiving faxes apply equally to them, too.
Use a Fax-to-Email Gateway

A fax-to-email 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 too.) 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, merely sends you an email notification and lets you download the image itself using a Web browser or desktop application.

**Note:** The eFax and Nextiva fax-to-email gateways let you keep your existing fax number (others may, too, but I have confirmed only about those two). If lots of people already have your current number, using a service that requires you to switch to a different number may involve some inconvenience.

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. But there’s 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 stand-alone fax machine. Here are but a few examples:

- eFax
- jConnect
- MaxEmail
- MyFax
- Nextiva
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About the Author

Joe Kissell is a Senior Editor of TidBITS, a Web site and email newsletter about Apple and the Internet, and the author of numerous books about Mac and iOS topics, including *Take Control of Your Passwords*, *Take Control of Dropbox*, and *Take Control of Backing Up Your Mac*.

He is also a Senior Contributor to Macworld, was the winner of a 2009 Neal award for Best How-to Article, and has appeared on the MacTech 25 list (the 25 people voted most influential in the Macintosh community) since 2007. Joe has worked in the Mac software industry since the early 1990s, including positions managing software development for Nisus Software and Kensington Technology Group.

When not writing or speaking, Joe likes to travel, walk, cook, eat, and dream (in both senses of the word). He lives in San Diego with his wife, Morgen Jahnke; their son, Soren; and their cat, Zora. To contact Joe about this book, send him email.

Shameless Plug

Although I currently write and speak about technology as my day job, I have a great many other interests. To learn more about me, read other things I’ve written, and find out what I’m up to beyond the realm of Apple products, visit my home page at JoeKissell.com. You can also follow me on Twitter (@joekissell) or App.net (@joekissell).
About the Publisher

Publishers Adam and Tonya Engst have been creating Apple-related content since they started the online newsletter *TidBITS*, in 1990. In *TidBITS*, you can find the latest Apple news, plus read reviews, opinions, and more.

Adam and Tonya are known in the Apple world as writers, editors, and speakers. They are also parents to Tristan, who has reached the age where he can read, understand, and find mistakes in the Take Control series.

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