



Going Paperless

UniversalOnePublishing.com/Going-Paperless

Your Instructor



Leah Arnold

leaharnold2@gmail.com

- ❖ Computer technology instructor for over 30 years
- ❖ Degrees in Computer Information Systems and Business Management
- ❖ Project management certifications (PMP and PRINCE2)
- ❖ IT service management certification (ITIL)
- ❖ Consultant and Contractor for the federal government, nonprofits, and private corporations
- ❖ Hobbies include martial arts, hiking, and traveling

Week 1

Course Description

Papers ... we've all got them!

In this class, we will discuss the pros and cons of paperless filing. We'll talk about scanning existing documents and accessing documents you might not have realized are available online. We'll discuss putting your documents into an online cloud system and keeping the important originals at your disposal. We'll explore various tools to make these tasks easy. By the end of this course, you will have developed a plan and have already started on your mission to paperless management.





Course Objectives

- ❖ Categorize documents to develop an organized file structure that will be used for creating an online document system.
- ❖ Recognize the tools and resources to create an online filing system that is easy and flexible enough to be utilized every day.
- ❖ Evaluate the importance of data and documents to make an informed decision on whether to keep or purge.
- ❖ Develop a system that enables the quick and efficient search of online documents to immediately obtain needed information.

Documents



Week 1

Activities

- Where are our documents
- Cloud storage
- Cloud storage vs Local storage
- Passwords
- Tools & Resources
- Draft a category list

Homework

- Finalize your category list (Look at your folders and files and think about how you would like to categorize them)
- Think about which cloud service you will use
- Think about which external storage device you will use
- Think about which shredder you will use
- Think about which scanner you will use



Week 2

Activities

- Review your finalized list of categories
- Review the topics from last week
- Compare tools & resources
- Prepare a draft list of tools
 - Cloud service
 - External storage device
 - Scanner
 - Shredder

Homework

- Finalize your choice of a cloud service
- Finalize your choice of an external storage device
- Finalize your choice of a scanner
- Finalize your choice of a shredder
- Install software for the above tools on your computer (optional)
- Bring your laptop to class next week (optional)



Week 3

Workshop class

- Review finalized list of tools
- Review the topics from previous weeks
- Research additional tools
- Laptop (optional)
 - Setup folders
 - Install applications



Where are we now?

Where are our documents?

- Bank statements
- Mortgage documents
- Health records
- School records



Let's get rid of the papers!

- Let's organize our documents and build a customized paperless system
- Let's build a system that enables us to quickly search for a document
- Let's figure out a system that works for us

Pros and Cons of a Paperless System

Pros	Cons
Access documents from any computer, anywhere, any time	Potential for cyber attacks and stolen data
Advanced security features (password protection, version control, document tracking)	Cloud system could crash, and information could get lost or corrupted
Eco-friendly	Document size limitations could be difficult to store
Easily backup documents for quick access in case of an emergency	Bandwidth limitations causing slow access to documents

Cloud Storage Service

(Cloud Folder Sync Service)

Google Drive, Microsoft OneDrive,
Apple iCloud Drive, Dropbox

These services create a folder on your local drive (C drive by default) and automatically synchronizes it with your cloud storage.

Files are saved on your hard drive. If the cloud storage service goes down, the files are still on your hard drive, and you can use them offline.

Your computer and the cloud will sync everyday. With the addition of an external backup device, your hard drive can auto backup everyday.



Comparison

Local Storage



- ✓ Storage of data on physical storage devices connected to a computer
- ✓ i.e. – hard drive, flash/thumb drive, DVD, SSD card, floppy disk
- ✓ Fast upload and download speeds
- ✓ Large storage space
- ✓ Privacy
- ✓ No internet connection needed
- ✓ No downtime, data is always accessible

VS

Cloud Storage



- ✓ Storage of data on a remote server managed by a hosting company
- ✓ i.e. - Google Drive, MS OneDrive, Apple iCloud, Dropbox
- ✓ Monthly or yearly subscription prices
- ✓ Additional services: data security, backups, maintenance
- ✓ Access files from anywhere, any time
- ✓ Share data with users over the internet
- ✓ Sync across all devices

What Makes a Strong Password

Password Strength Chart		SANDSTORM ^{IT} power on
123456 Top 10,000 password	0.20 milliseconds	Unsafe
qwerty123456 Longer "common" password	13 hours	Unsafe
ITFunSom3times Longer password with numbers	48 thousand years	Risky
ITi\$fun\$0m3times! Longer password with numbers and special characters	13 trillion years	Good
imusingalongpasswordtoday Even Longer password	913 trillion years	Better
imu\$inga1ongpa\$\$word+oday! Even Longer password with numbers and special characters	2 octillion years	Best

Please Note: These passwords are for demonstration purposes ONLY and are not to be used.

- Minimum 8-character length
- 12 characters is stronger
- Use a good mixture of characters (upper case, lower case, numbers, symbols)

[Test it!](#)

Going Paperless

2-Step Verification (2SV) / 2-Factor Authentication (2FA) / Multi-Factor Authentication (MFA)

An additional layer of security to protect the login process

Factor	Examples
Something You Know	Passwords, PINs and security questions
Something You Have	Hardware or software tokens, certificates, email*, SMS, and phone calls
Something You Are	Fingerprints, facial recognition, iris scans, handprint scans and behavioral factors
Location	Source IP ranges, and geolocation
Type	Description
Email	Sends a code via email
SMS	Sends a code via SMS
Phone	Sends a code via a voice call to a phone number

* Email only really constitutes “something you have” if the email account itself is protected with MFA.

Tools & Resources

Scanner



Cloud Storage



Shredder



Flash or Thumb Drive



iOS App



App Store

Android App



Google Play

External Hard Drive



Tools & Resources

Cloud Service	Scanner	Scanner App	External Storage	Paper Shredder
Apple iCloud Drive	Ricoh ScanSnap iX1600	AdobeScan	Hard disk drive	Auto feed with wastebasket
Dropbox	Canon ImageFormula R40	Apple Notes	Flash/Thumb drive	Auto feed without wastebasket
Google Drive	Brother DSmobile DS-940DW	Microsoft Lens		Manual
Microsoft OneDrive	Epson Perfection v39 II	SwiftScan		

Categories of Documents

Categorize documents to develop an organized file structure that will be used for creating an online document system.

What's important? What's not?

Evaluate the importance of the documents and make an informed decision on whether to keep or purge them.

Which documents will you scan?

Which ones will you download?

Which ones should you shred?



Categories of Documents (page 1)

Home	Car	Medical/Health	Finance/Bank	Personal

Categories of Documents (page 2)

Kids	Pets			

Categories of Documents (page 3)

**THANK
YOU**

See you next Wednesday

Week 2

Going Paperless Presentation

Tools & Resources

- ❖ Computer
- ❖ Cloud service
- ❖ External storage device
- ❖ Scanner
- ❖ Shredder



Tools & Resource

Keep three copies of important files

External Hard Drive



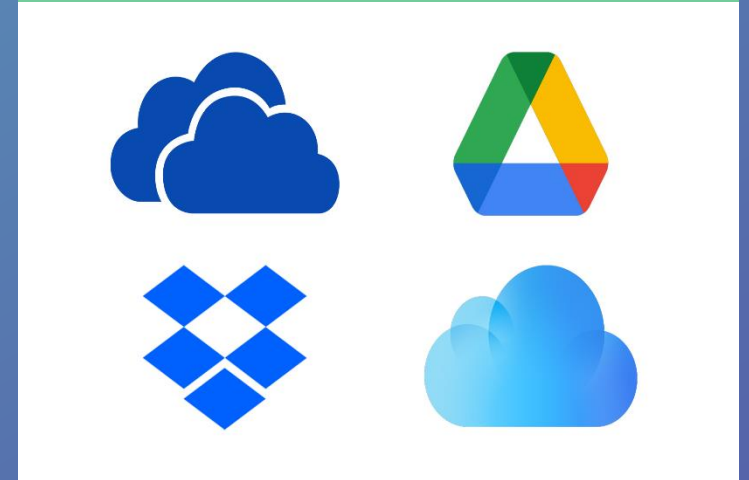
A storage device that holds a lot of information and connects externally through a USB port

Flash or Thumb Drive



A small storage device with less capacity and lower cost than an external hard drive

Cloud Storage



Digital data that is stored on servers located in off-site locations and managed by a third-party

For very important documents, keep one copy offsite in a location other than where your computer resides (i.e. – friend’s house, safety deposit box, etc.)

Tools & Resources

Scanner



Scan documents, photos, receipts, etc.

Shredder



Mini or standard paper shredder

Tools & Resources

iOS



App Store

[Adobe Scan](#)
[SwiftScan](#)
[Microsoft Office Lens](#)
[Apple Notes](#)

Android



Google Play

[Adobe Scan](#)
[SwiftScan](#)
[Microsoft Office Lens](#)

Cloud Storage Comparison

	<u>Google Drive</u>	<u>Microsoft OneDrive</u>	<u>Apple iCloud Drive</u>	<u>Dropbox</u>
Best for	Google Workspace users	Windows and Office users	Apple users	Long-time users of Dropbox
Free Storage	15GB (shared w/Gmail)	5GB	5GB	2GB
Max Storage Limit	5TB	5TB	2TB	Unlimited
File Size Maximum	30TB	10GB	15GB	20GB
Windows App	Yes	Yes	Yes	Yes
iOS App	Yes	Yes	Yes	Yes
Android App	Yes	Yes	No	Yes
Unlimited Storage	No	No	No	Yes (\$20+/mo)
Paid Plans for \$9.99	\$9.99/mo (2TB)	\$6.99/mo (1TB)	\$9.99/mo (2TB)	\$9.99/mo (2TB)

Other cloud storage options: Box, iDrive, Sync.com, pCloud

Scanner App Comparison

	AdobeScan	SwiftScan	Microsoft Lens	Apple Notes
Best for	Best free scanning app (NY Times)	Powerful (NY Times)	Best for Microsoft Office users	Best free, basic app for iOS users
Storage Location	Adobe Document Cloud	iCloud, OneDrive, Google Drive, Dropbox	OneDrive	iCloud
Free version	Yes	Yes	Yes	Yes
Apple App	Yes	Yes	Yes	Yes
Android App	Yes	Yes	Yes	No
Paid Plans	\$10/mo (Premium)	\$7.99/mo (Pro)	N/A	N/A

Scanner Device Comparison

	<u>Ricoh ScanSnap iX1600</u>	<u>Brother DSmobile DS-940DW</u>	<u>Epson Perfection v39 II</u>
Best for	Speed, full-featured	On-the-go, space saving, fits in a purse or deep pocket	Low cost
Scanner Type	Auto feeder	Compact mobile, battery powered	Flatbed
Media Type	Documents, photos, receipts, post cards, business cards	Documents, photos, receipts, post cards, business cards	Documents, photos, receipts, post cards, business cards
Sheets per minute	40	15	3 to 6
Mobile app	Yes	Yes	Yes
Duplex	Both sides at once	Both sides at once	One side at a time
Scan to cloud	Yes	Yes	Yes
Cost	\$399.99	\$199.99	\$109.99

Paper Shredder Comparison

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Tools

Cloud Storage	Scanner	Scanner App	Shredder	External Storage

**THANK
YOU**

See you next Wednesday