

How to Use Your Smartphone as a Scanner

By LTCL Tech Coach Doug Hillary

As we become more “digital” in how we interact with others, I find that I am being asked more often to share or send electronic documents – perhaps a contract, receipt, application, proof of payment, or a refund. You may even be asked to show electronic documents to gain access to events, or perhaps show vaccination records. In the past, you needed an expensive scanner or multi-function printer to scan documents. Fortunately, with recent advancements in smartphone software, you can now easily use your phone to scan documents.

iPhones:

When Apple released their iPhone iOS 11 software in 2017, they made it much easier to use your iPhone to easily scan documents. Here are the steps:

1. Place your document on a well-lit flat surface. Tap your Notes icon (*see figure 1*) to open Notes.
2. Once open, you can create a new note by tapping on the symbol at the bottom right of the screen. The symbol looks like square with a pen.
3. Once you do so, a new screen appears. One of the icons is a camera. Tap on the camera and it will give you a few options. Choose “Scan Documents.”
4. Your camera will open to allow you to take a picture of the document.
5. Place your document in view of the camera and take a picture.
6. You can then either save the document as-is, retake the picture, or adjust the size to fit the page by moving the circles on the corners.
7. If you’re happy with the image, then tap “Keep Scan.”
8. You then have an option to take another scan (if you have multiple pages) or save the scan.
9. Your notes screen will appear with the image(s).
10. If you wish to access the Note from the main Notes screen, you will find it under “Notes” in the iCloud portion of your menu.



Figure 1- Notes icon

If you attempt to follow these steps but cannot take a picture or scan a document from your Notes application, then it is possible you either have an older version of iOS, or you haven’t connected Notes to your iCloud. If you have iOS 11 or greater, and an iCloud account, then here are a few steps to help you solve this issue.

1. Open iPhone Settings.
2. Tap on the top section that includes Apple ID, iCloud, Media & Purchases.
3. On the next screen, press iCloud.
4. On the following screen, see if Notes is disabled (gray). If so, enable it (green).

Once you do so, you should see iCloud appear on your Notes main screen. When you open a new note, you should also see a series of icons just above the keyboard, including the camera which will allow you to scan, save, and send documents.



If you have an older version of iOS, and either cannot or do not wish to upgrade to iOS 11 or later, then you will need to rely on third party software to scan documents.

Now that you've scanned your document, what if you wish to share or send it with someone? That is also simple to do.

1. If you tap on your document in the Notes application, you will see the image appear.
2. On the upper right of the screen, you will see a circle with 3 dots – tap on it.
3. A new screen pops up which gives you a few options including “Send a copy.”
4. Once you tap on Send a Copy, another screen appears which gives you options to send or share the document via AirDrop, Message, Email, or social media applications.
5. Tap on Mail. On the next screen enter your mail recipient(s) and any other changes you wish and then hit send.

Android Phones:

If you happen to have an Android phone, you can also scan documents from your phone. The following steps should help you.

1. From your phone's home screen, open the Google Drive app. 
2. Once the app opens to the main page, tap on the plus symbol on the bottom right.
3. It may ask you for permission to access the phone's camera. If so, select “allow.” If not, tap “scan.”
4. Take a photo of the document you would like to scan.
5. You will immediately see a preview image. It may look like the document is cut off, but if you tap on the crop button  you will be able to re-size the image. Tap, hold and drag the dots to cover the area you wish to save.
6. Once finished, tap on the checkmark on the lower-right corner of the screen.
7. From here, you have three more options – either tap the plus icon to add more pages, tap the circular arrow button to redo a scan, or tap the checkmark icon to upload the document to Google Drive.
8. You can also make other adjustments to your scan from this screen as well. If you look at the upper right of the screen, you can tap on the painter's palette to change the color selection of the document, or you can tap on the three dots to delete, re-name, and rotate the scan if needed.

If you wish to share or send your document, you can do so from Google Drive's main page. If you choose “share link,” it will give you a link to the selected document on Google Drive that you can send to others, or if you choose “send a copy,” it will allow you to email a copy of your document to a recipient.

I hope these steps make it easier for you to use your smartphone to scan, save, and share any documents you require. As always, please send any questions or comments to our Tech Coaches.

Tech Coach Assistance

Tech Coaches are now providing remote Tech Coaching. Simply send an email to techcoach@laketravislibrary.org and one of our coaches will respond to assist you with any questions or challenges you may have.