



Scanning your document is
only half the battle.

Thanks for reading,
Brooks Duncan

4 Ways To Tame Your Documents

You're Almost There

If you're reading this, it probably means that you've decided to "go paperless". Does going paperless mean that every piece of paper in your life is eliminated? Probably not.

But it does mean that you have already made an important step in uncluttering and de-stressing your life.

Whether you already have a scanner or not, I'm guessing you have a bunch of documents on your computer and you are not sure of the best way to handle them.

Where Do We Go From Here?

After reading this guide, I'd like you to commit to actually put into place at least one of these recommendations and give it a try for a while. I promise it will make a big difference in your ability to find the information you need quickly and easily.

Ready? Let's do it!

Make Your PDF's Searchable

Many people go to the trouble of scanning their documents to PDF, but don't take the critical step of making their PDF's searchable. Why is this a problem?

Think about wanting to find something on the Internet. Imagine if you had to go to some directory and click into different categories or folders to try to find what you are looking for. It would take forever, and half the time you'd give up. What do you do instead?

Chances are, you go to Google and type in some keywords and more often than not, what you need is there on the first page.

Let's say that your furnace is acting up, but you can't remember if it is still in warranty. If all your documents were scanned and searchable, you could go to your document system and type in "furnace" or "Lennox", and it would bring back your purchase receipt, your warranty documents, and maybe even the manual! All that just from typing one word.

That's where you want to get to.

How do you do that? Chances are, your scanner comes with OCR software (a fancy term for making documents searchable), so make sure you enable the option or run it after scanning. If your scanner didn't come with OCR, never fear. Read on and you will find some other options.

Use What Already Comes With Your Computer

You might not realize this, but once you have searchable documents, everything you need to find your information might already be built into your computer.

Stay Away From Folders

OK, obviously you can't do away with folders altogether. But what I want you to do is resist the temptation to replicate your physical file folders, or make some crazy elaborate nested folder structure.

We've made our PDFs searchable, right? So we're going to forget about trying to decide whether that bill goes into the "Home" or the "Maintenance" folder, and just put it (since we have to put it somewhere), in a general "Home" folder. When we need to find it, we'll find it with searching.

Windows

If you have Windows Vista or Windows 7, you're in luck. Windows Search is bundled with the operating system, so you should be able to search inside your PDFs using the built-in Search box.

If you have an earlier version of Windows, never fear. You can download [Google Desktop](#) or [Windows Search](#) and do the same thing.

Mac OSX

If you're a Mac user, you're not left out. Mac OSX has included PDF searching functionality for quite some time.

Up in the top-right corner of the screen is a magnifying glass. Click that and you bring up Spotlight, Mac's search tool.

Type some text in the box and you will bring up any PDFs that contain the phrase.

By the way, a lot of people don't know this but the built in Preview app in the Mac has a lot of great document management features. Check out [this article](#) that I wrote that goes into more detail.

You can see that by making your PDFs searchable and using the search tools that are built into your computer, you can achieve a pretty good paperless workflow.

However, if you want to kick things up a notch (as they say), there are some software tools you can use. Read on to find out more.

Software Tools

If you want to go beyond just searching for documents and use more features such as tagging, built-in scanning, auditing, etc., you'll need some additional software.

Windows Only

If you own a [Fujitsu ScanSnap](#), the ScanSnap Organizer software that comes with it is actually quite good. It will OCR your documents and has quite a few management and manipulation tools. You can also create "cabinets" to organize your documents in.

[Home Document Manager](#) from Dokix is a good tool. It supports TWAIN scanners and will OCR and tag documents.

If you have more advanced document management needs, [M-Files](#) by Motive Interactive is an extremely fully featured document management system. Note: if you are interested in checking out M-Files, [email me](#) and we can figure out if it is right for you since I have done some client work with it recently.

Mac Only

I like [Yep](#) by Ironic Software. It uses an "iPhoto-like" interface to display your documents and lets you tag and search them.

If you have more advanced needs, [DEVONthink Pro Office](#) is a top-of-the line tool for information management. It integrates with scanners, stores scanned documents, email messages, notes, etc., and lets you edit and annotate your PDFs. It also uses artificial intelligence to show relationships between your documents.

Go Online

Sometimes it can be really handy to be able to get at your documents when you are on the go. Here's a few ways.

[Evernote](#) has Mac and Windows clients, and your notes/documents are synced to the server (if you want them to be). You can then log in via the web and access all your notes, or view them using the Android, iPhone, or iPad clients. Evernote is free for storing PDFs, but the paid plan will also OCR your PDFs for you to make them searchable.

[Dropbox](#) is actually a file syncing service. Any files you save in your Dropbox folder get synced to Dropbox's servers, and can also be synced to any other computer as well. Dropbox has a super handy iPhone and iPad app (and website) that will let you view your documents when you are on the go.

[Shoeboxed](#) and [OfficeDrop](#) actually let you mail your physical documents to them, and they do all the scanning for you. You can then log in via the web interface (or iPhone apps), and get at your documents. Shoeboxed is more tailored to receipts and business cards, where OfficeDrop will take most any type of document.

What's Next?

Get The Right Equipment

If you're ready to go paperless and you're not sure if your scanner will do the job, I highly recommend the [Fujitsu ScanSnap](#) line. The desktop [ScanSnap S1500](#) (for Windows) or [S1500M](#) (for Mac) are great, as is the [ScanSnap S1300](#) which is their mobile scanner for both Mac and Windows.

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If you received this free report from a friend, you're missing out on the rest of the package. [Click here to get free instant access to the Paper Sanity e-course](#) and learn a lot more about how to go paperless easily and stick to it.

Get Coaching

If you want someone to help you go paperless, consider having me put together a customized paperless workflow. It'll save you time and you'll get just what you need and nothing you don't. [Click here for more information.](#)

Who Am I?

In a former life I was an accountant, a computer programmer, a client services director, and now I help people unclutter and de-stress their lives by turning their piles of paper into an organized electronic system. Thanks for reading!

Brooks Duncan

brooks@documentsnap.com

<http://documentsnap.com>

