

The Denver Tax Paperless Office Letter

*"Turning the paperless office dream into reality."*TM

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Dear Client:

The "Paperless Office" is a moving target! In 2002 we authored "[How To Setup A Paperless Office – You Can Do It and Save Money](#)." The logic in that guide provides a step – by – step map for moving from a traditional paper file system to a digital or paperless file system.

The main theme in "How To Setup A Paperless Office" is that the paperless system should be built using replaceable software and hardware. For example, if the software that allows you to search your paperless files is no longer doing the job, replace it with indexing software that can do the job! This sounds like a simple concept, but many expensive integrated systems don't give you this flexibility.

The Denver Tax Paperless Office Letter will tell you how to get the most out of your paperless office system with the least effort and cost. This newsletter will provide you with the latest information to make a paperless office work efficiently. As new information becomes available, we will discuss OCR software, scanners, indexing software and file management software, etc.

Desktop Search -- Find Important Stuff Fast

Time & money saving tip. With the Adobe Reader (free) and Adobe Acrobat Standard (\$270 street) , you can search multiple PDF files created with Adobe Acrobat Professional (\$390 street). As far as we can tell, this indexing feature was the only reason to buy Adobe Acrobat Professional unless your business was heavily into graphic design. Thus, the fixed cost of being able to create a searchable index is \$120 (\$390-\$270). In addition to the cost, it is a pain to create a searchable index using Acrobat Professional. Reason 1: You could not schedule indexing within Acrobat Professional. Reason 2: It was difficult, but not impossible, to index more than one computer at a time. Until recently, search programs, like dtSearch (network \$780,

HIGHLIGHTS

Search Find Important Stuff Fast.

Wasted Time Why is the boss filing?

Time Saving Times Small things that can make a big difference.

Office Layout Shredders & scanners don't mix.

Fingerprint Logon Use your fingerprint instead of passwords.

Click on blue links for more information!

desktop \$194), were relatively expensive. That has now changed in a big way!

There are several programs for searching a single machine. [blinkx Desktop Search](#), [Copernic Desktop Search](#) and [Yahoo! Desktop Search](#) are **FREE** and more capable products than using Adobe Acrobat's search feature.

blinkx only was capable of indexing Windows XP machines. Thus, if you were running Windows 2000 Professional, blinkx would be out of the question.

Copernic's search input did not recognize the search operators, like "+", "-", "AND", that you can use with the typical Internet search engines.

Google has a desktop search engine (beta) that does not search PDF files. Since PDF files are critical to a paperless office, we cannot recommend the Google product at this time.

Our recommendations. Yahoo! Desktop Search is really a dumbed down version of X1 Technologies [X1 Desktop Search](#). X1 Desktop Search (by X1 Technologies) is \$75. What the \$75 buys you is the ability to search your network, as well as, your desktop. If you have a network, our recommendation is X1 Desktop Search. If you do not have a network, our recommendation is Yahoo! Desktop Search.

X1 Desktop Search has so many ways to be configured that it can be confusing. Our recommendations to configure X1 Desktop Search: [Denver Tax Paperless Office Letter Bonus: How To Configure X1 Desktop Search](#).

[Email us with your desktop search experiences.](#)

Your Highest Paid Employee Shouldn't File!

Time Saver Should the Managing Partner or CEO spend hours stuffing paper into a filing cabinet? NO! For the traditional paper based filing system, it is general knowledge that the boss should not spend lots of time filing?

However, due to the novelty of paperless systems, we see the boss spending more time filing with paperless systems than with the paperbased system. This results in a deterioration in the savings that the business is expecting from a paperless system. Complexity and training are part of the issue.

One way to reduce the complexity is to use a Scanner Cover Sheet. Very simply, this lets the boss check a few boxes, fill in a word or two, and the person who should do the scanning knows where it should be filed.

The Scanner Cover Sheet should include two sections:

- The first section should be folder or directory where the scanned file should end up. With most paperless systems this can be limited to several choices.
- The second section should be the filename. Many files will share the same prefix or suffix. Again, this can simplify things by reducing the choices.

At our CPA firm, we saved lots of time and confusion by using a Scanner Cover Sheet. [Denver Tax Paperless Office Letter Bonus: David M. Kaufmann, CPA Scanner Cover Sheet.](#) Please feel free to modify this for your own business!

[Let us know what you do to keep the right person doing the right task in your paperless office.](#)

Time Saving Tips – Small Things That Can Make Big Differences

Time Saver You can read 25% faster if it is on paper! If you plan to read a long “paperless” document, print it out. Black ink on paper is easier and faster to read than black type on the typical computer screen.

Time Saver Use Bookmarks in PDF files. Lets say you are reviewing a large tax return on the screen. You need to flip back and forth between numerous schedules. One way to navigate the PDF file would be to use the **Page Up** and **Page Down** arrows. That is equivalent to going back and forth one page at a time. Use bookmarks instead.

Lets say you need to look at Schedule C, Form 4562 and Form 4797. When you get to Schedule C, press **Ctrl-B** to insert a bookmark. Do the same for Form 4562 and Form 4797. Make sure you have clicked on the Bookmark tab on the left side of the screen. Now you can click on the bookmarks for the various forms to see what you want, and skip what you don't need to look at. *You can create bookmarks with Acrobat Standard or Professional.*

Time Saver Name files fast using **File – Save As.** When you are in a typical program, do you use **File – Save As** and type in the filename to select a filename for a new file? If you do, you are doing what Microsoft intended you to do. You can turn **File – Save As** into a time savings tool.

Lets say you are working on a file, “test long filename 1 del-05-04-2005.xls.” You do a what-if scenario and you want to save it as, “test long filename 2 del-05-04-2005.xls.” Typing “test long filename 2 del-05-04-2005.xls” would take 39 keystrokes.

A faster way to create “test long filename 2 del-05-04-2005.xls” would be to use the Windows Explorer window in [File – Save As. Denver Tax Paperless Office Letter Bonus: Get The Most Out Of File – Save As.](#)

Time Saver Capture filenames quickly and accurately using **File – Save As.** Lets say you want to put an Acrobat filename into a Word document. You certainly could type in “XYZ Corp 2004 Lapsing del-10-15-1013.pdf.”

into your Word document That would get old fast, and it is easy to mistype the filename. Instead, open *XYZ Corp 2004 Lapsing del-10-15-1013.pdf* in Acrobat. Hit **File – Save As**. Press **Ctrl-C** to copy the filename to the Windows clipboard. Press **Ctrl-V** in the Word document to insert the filename.

Scanners & Shredders Don't Mix

Security Don't put your shredder next to your scanner! Good office layout procedures suggest that related types of office equipment should be kept together. Thus, it would be natural to think that the department shredder should next to the department scanner. That would certainly promote efficiency. Scan the document first. Shred the document next. **Don't do that!**

Security is even more important than efficiency. If the scanner is next to the shredder, someone in your office might easily shred documents that are meant for the scanner. Result: A disaster.

Have a delayed shredding policy. Hold documents to be shredded for a month before shredding. Here is our low tech (high security) suggestion. Use four paper boxes. With PostIts label each with the dates for the Monday's of the month. Example, January 1, January 8, January 15 and January 22. Fill the boxes with documents to be shredded based on when the documents were scanned. When it is time for you to setup the January 29th box, shred the contents of the January 1 box and re-label it with January 29. *Modify this based on the size of your business and the frequency of your backups.*

Use Your Fingerprint Instead Of Passwords

Security Our experience with fingerprint scanners wasn't good! We tried the [APC Personal Biometric USB Pod \(BIOPOD\)](#) (Street price \$35) on two machines running Windows 2000 Professional. In the past we have had good experience with APC products.

On one machine, the BIOPOD or its software made the computer so unstable that we uninstalled the BIOPOD within a week.

On my machine, I would take more time messing with the BIOPOD than I would have taken to lookup and type in the password! Using the fingerprint reader was addictive. I kept trying and trying. Sometimes it worked right a way. Sometimes it worked after several minutes.

Several factors can result in lower fingerprint recognition. In the morning, when my hands were cold from our Colorado winter, the fingerprint reader was less effective. Using hand lotion can reduce fingerprint recognition and increase the need to clean the fingerprint scanner.

The BIOPOD's software would slow the computers down. I don't know why the software needed to run constantly in the background. After installing the fingerprint reader, my computer ran slower. Uninstalling the fingerprint reader solved the problem.

What, if any, was your experience with fingerprint scanners?

Don't Do This At Home Department While researching this topic I ran into a practical joker's blog. He put a bowl of gummy bears by the fingerprint reader. Needless to say, this degraded the performance of the fingerprint reader.

Your Feedback Please

What should we cover in future newsletters? What topics would you like us to cover? Did you find our "Bonus" items like [Denver Tax Paperless Office Letter Bonus: How To Configure X1 Desktop Search](#) or [Denver Tax Paperless Office Letter Bonus: David M. Kaufmann, CPA Scanner Cover Sheet](#) worthwhile?

Email us with your feedback to teamdts@denvertax.com or call us at 1-800-326-6686.

Sincerely,



David M. Kaufmann, CPA

P.S. Included in the next edition:

- 2005 Scanner recommendations.
- Acrobat 7. How does it compare to Acrobat 6.