THE ELECTRONIC INVESTOR

Edited by Randall W. Forsyth

Eliminating Your Paper Trail

Document-management software can clean up your dead-tree detritus

REVIEWED by THERESA W. CAREY

LIKE THE OFFICES OF SO MANY writers, mine easily could be declared a disaster area. I'm surrounded by teetering piles of paper, and even though I clear it out every few months, there's always more to replace what I just threw out.

But if you're investing in a home office, especially something state of the art as detailed in this week's cover story starting on page 28, the last thing you want is mountains of paper.

Computers were supposed to fix this problem by helping create a paperless office environment. Rather than send paper memos here and there, e-mail was supposed to save entire forests. Paradoxically, recent studies (which a cynic might note were sponsored by printer manufacturers Hewlett-Packard and Lexmark) have shown that paper consumption has increased to record levels—and is expected to continue growing. The studies indicate that many computer users print out hard copies of e-mails and Websites so they can physically file them, or because they prefer reading from paper rather than the screen.

I tracked my personal printing habits for a week and noticed that most hard copies I create of online information involve maps, directions, and flight plans (I'm a private pilot). I'm just not yet comfortable reading directions off a computer screen.

But I'm able to deal with e-mail on the screen and seldom find it necessary to print Web pages. When I want a permanent record of a particular Website, I use a program called SnagIt to make a file copy of the screen. (There are dozens of screen-capture programs available; this is the one I've found that works best for me. It's shareware and can be found at www.snagit.com.)

There's an alternative, however, to piles of paper printouts of Internet pages and e-mail messages: document-management software.

These programs store the information you want to save in virtual file cabinets, and provide search capabilities so you can find them without having to do an archeological dig through the piles on your desk. You can use them to grab your online-brokerage records as well as keep snapshots of your portfolio from day to day.

Large companies use document-management programs to replace acres of filing cabinets with a few computers. For small business and home-office users, the space required to manage the piles of paper isn't as onerous, but the ability to locate a particular item quickly once it's stored digitally is

a major benefit.

These programs work by creating a file rather than a printout when you use the "Print" command for a particular program. When you install one of these document-management systems, they create a virtual printer; selecting that option when you print a document creates a file you can place where you want on your computer. You can scan in the pieces of paper you receive that you want to store.

This electronic-filing cabinet that stores not only documents you might scan in, but also images, word-processing documents, spreadsheets, e-mail attachments—any program that you can print from can store an image format on the system, and the integrity of the document is maintained.

Document-management programs typically use a variation of the filing-cabinet metaphor for storing your virtual printouts. Should you receive or generate a document—either electronically or physically—that you want to store, you pull it into the program, then choose a file folder and index it. For instance, you can designate one virtual drawer for tax records, and another for medical information.

The indexing step is crucial to finding the document in the future. When you

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Besides eliminating clutter in a home office, a major benefit of storing documents digitally is that you can find them quickly.

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need a particular document, you can locate it either using the program's search function, or by scanning the drawers you've defined.

Both these programs allow you to define many types of documents, such as invoices, letters, news clippings, or tax-related statements, and set up the indexing fields you'll use to categorize each document. The indexing step is the most time-consuming part of the process, however. Like setting up a personal-finance program, with all the data entry re-
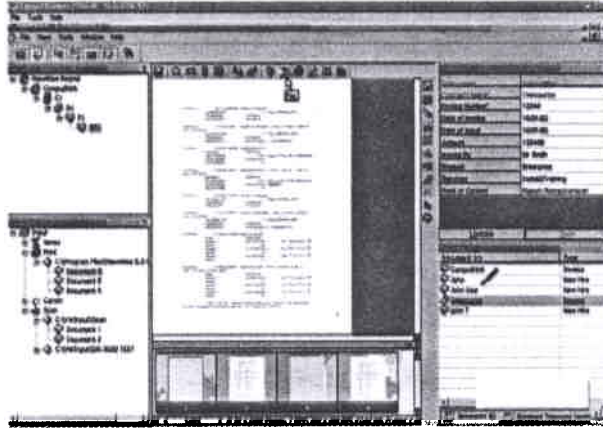
A place for everything: Programs such as ViewWise (above) "print" a virtual document and file it where you can find it—in your PC.

quired to use it properly, indexing is the major barrier to decreasing the amount of paper floating around your office.

We took a look at two document-management programs that are aimed at the home office or small business, ViewWise by CompuThink and DocuXplorer. Windows-based, both are priced at less than $300 for a single user, with network versions available. (Apple Mac users might check out the Optix Single-User Edition, which we were unable to review for this article. More information is available at www.mindwrap.com/products/optixsue.html.)

Both these programs are able to store documents in a wide variety of formats, and they include built-in file compression that can reduce the amount of disc space needed. Both programs also have a powerful database built in, so you can categorize and search for documents; not so long ago, you had to buy your own database as well.

One helpful feature that both programs have is the ability to preview a particular document, then open the application that created that document if you want to take a closer look. For instance, if you've searched for some notes you took in Microsoft Word from a telephone conversation six months ago, either DocuXplorer or ViewWise can open Word if you want to edit the notes once you've found them.

I found the ability to add pages to a stored document valuable; for instance, when you get your monthly brokerage statement, you can file it in the same folder as the rest of the statements for the year to date. Then when reviewing them, you can just flip through the pages one by one. Both programs include OCR (optical character reader) capability, which allows you to pick up

scanned text and paste it into a word-processing document.

The current versions of both programs allow you to store not only documents in the system, but also photographs and movie files as well. Another attractive feature is exporting your document database, or a portion of it, to a CD—either as a backup or as a portable version of your filing cabinet.

If I had to choose, I'd have to give my nod to the ViewWise program, though I found both of them relatively easy to use. ViewWise's small-business version allows as many as five users on a network, while DocuXplorer's is a single-user version.

ViewWise allows the program administrator to define different security levels, including the ability to block pieces of a document from prying eyes. DocuXplorer's single-user edition doesn't have any security features built in; you have to upgrade to the network version to get those capabilities. The screen layouts for ViewWise are easier to navigate as well, though getting acclimated to the five-pane screen might take an hour or two.

The biggest drawback to effective use of these programs is converting your current piles of paper into neatly indexed files. Having an effective backup scheme is a necessity as well. (You should have one for your crucial data anyway.)

ViewWise is running a special and is priced at $299 currently; check its Website to see if you qualify for some additional rebates (www.computhink.com). You can download a 30-day trial version of DocuXplorer from its Website and give it a test drive (www.docuxplorer.com).

▶ SPAM-PREVENTION UPDATE: A FEW months ago, I mentioned MailWasher, a small program that lets you filter out spam before it hits your inbox. The publisher recently released an update which runs considerably faster, and also works for Hotmail. You can bounce messages back to spammers so that it appears that your e-mail account no longer exists. The program is shareware; registration will set you back $20. Check it out at www.mailwasher.net. ∎

▶ E-MAIL: electronicinvestor@lycos.com