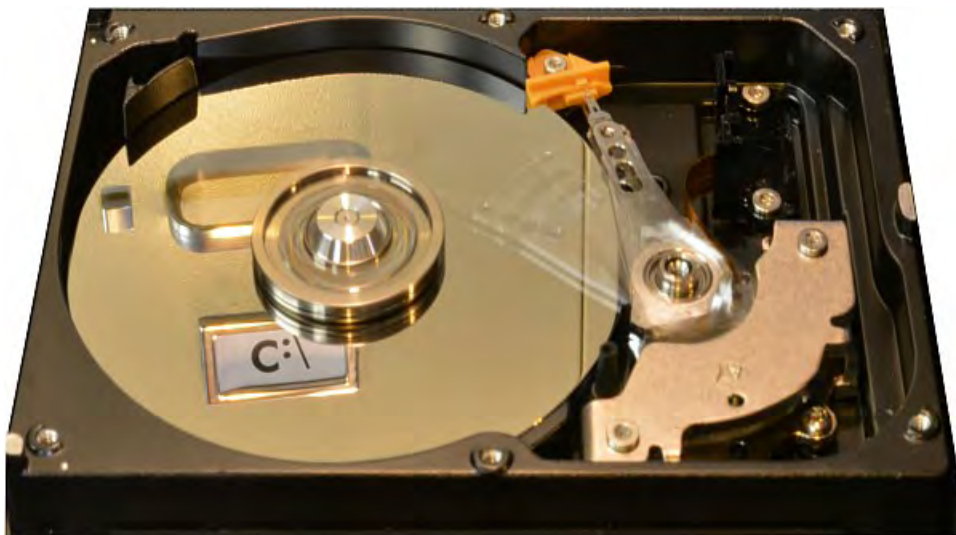




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## Going Paperless for the New Year



We want a normal year, but all we can really expect is the new normal. So that's more remote work, and more pivots to new ways to work from home, and hybrid models of half the staff working remotely. And maintaining distancing inside the office, well, all of that really leads to paperwork causing problems because it's in the wrong office when you need it. If your files are stacked horizontally and creatively on every flat surface in your office, remote work and hybrid work just aren't practical.

I've been at around 99% paperless for 5 years now. It's really easier than printing, stacking, and (someday, maybe) filing, because all there is to it is to print everything to PDF and save it where it should be filed by client or project, the first time you touch it. So if any paper still piles up, it has to be dealt with, entered into notes or scanned, and from that point on, the file cabinets stop accumulating paper. I still print a few items for convenience, mostly paperwork I need for work outside my office. Those items aren't filed permanently. That's about it.

And, of course, there is one brutal truth to paperless systems: Pretty much

nobody goes back and scans the entire company history and moves the old file cabinets into digital storage. That's OK; scan anything you pull out of an old folder as you need it, and file it on your server properly, and eventually, all the remaining paper will be ancient and no longer required for records retention.

But making the switch requires planning. Paperless systems replace file cabinets and paper, so they have to be readable years from now.

## Read Your Files, in 15 Years?

For long-term storage, we need file formats that will work for as long as you're running your business. File types have changed, and there are only a few standards that will work long-term.

If you have graphics files from the 1990's, they probably include files with extensions of .bmp and .wmf. Now, we use .jpg and .png files for graphics. It's still possible to read the old files, but you have to go looking for the right software. WPD files from WordPerfect, which had a 95% market share in word processing 30 years ago, are now only readable in WordPerfect, which is, for now, still being updated and sold. DOC files were replaced by DOCX in 2007, and are mostly still readable, but files saved as DOC files for Word tend to turn into unformatted junk in newer versions of Word and when matched with new printer drivers.

The answer is to use a file format designed to always look the same on any screen and on any printer. Several of these formats were created back in the '90s, like Corel Envoy, but the Adobe Acrobat PDF file, short for 'Portable Document Format,' became the standard. Saving files as PDF ensures they will be readable in the future, and still maintain their formatting. There are thousands of programs that work with PDF, and the PDF file format has officially been non-proprietary since 2008.

More here: <https://en.wikipedia.org/wiki/PDF>

So it's best to save long-term records as PDF, rather than .docx, .wpd, or anything created by whatever software is popular this year.

You could also use Open Document Format, which is created by LibreOffice, OpenOffice, and some other office suites; it's also a standardized non-proprietary format. That's ODF for word processing, and ODS for spreadsheets. <https://en.wikipedia.org/wiki/OpenDocument>

## Sort the Files As you Create Them

On your server, you need multiple folders for each client, year, and project. Those three can be in any order, as it best makes sense for what you do. The earliest version of this I saw was a folder, 'Reports', and then a folder for each year, and inside that, a folder for each project, by street address, and an extra

top-level folder for 'paperwork' for the office itself. In other words, the drive folders are organized as \Reports\year\location.

Other offices, with larger, long-term projects, may find it better to use the sequence of \Project\Year\Service. Or, for many repeat clients: \Service\Client\Year. My files are usually organized as \Project\Year\Client and there is a second set for Programming and Web Design projects, including this newsletter.

Don't skip creating folders by year for incoming invoices and payment confirmations; there are always lots of them. A Software folder is useful for license keys, and a Hardware folder can hold notes on computers and office equipment, instruction manuals for technology (download them from the manufacturers), and configuration notes.

## Software

You need software to find all those files, and bluntly, software that forces your staff to choose the right folder for each document as soon as it's created. For one person, the PDF print driver built into Windows 10 works just fine; that's all you need. Beyond that, there are programs in two categories to manage and search all those files: Document Management Software, and Practice Management Software. Document management is more generic, and works for any type of business, and there are versions for single users and offices full of staff. The best-known product for home offices is PaperPort (now owned by Kofax).

For larger offices, look at the category of 'practice management software' for your type of business. That will manage documents, and usually also handle job progress and invoicing. Just be careful that if the product uses a database, you back it up and export it regularly. Documents are not a big problem to read, moving forward, but databases that store documents won't be readable without the original software. If the tool you choose runs only as a database, save reports that detail whatever you need for long-term reference; save them as PDF files, so that if you change vendors later, you can still read the history.

## Backup, Backup, Backup



And of course, when all your files are on a server, you need three copies of everything. That's the 3-2-1 Backup Rule, one copy on the file server, one in

local backup, one in cloud backup. Or put another way, 3 copies, 2 different media types, 1 set off-site. There's more on 3-2-1 Backups in my August 2017 newsletter, here:

[https://www.startupware.com/PC410\\_Newsletters/](https://www.startupware.com/PC410_Newsletters/)

And there's my free reference chart on 3-2-1 Backups, here:

<https://www.pc410.com/articles/free-3-2-1-backup-reference-chart/>



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