

One of the things about working with Paper Tiger and Digital Tiger is having a change in your attitude in how you work. Getting organized is not just about making things pretty. It's about having a methodology - a system to help you change your habits to be more efficient.

I think it's important to know that when I started my business, Strategize and Organize, back in 2002, I was floundering wondering how was I going to help my clients get organized with their paper. I was an executive in the corporate world for almost 20 years, and I always had tremendous staff and assistants to help me with my own paper flow. But the world has changed and for the most part, we are all doing it on our own now. Everyone has their own way of thinking about filing. Well Paper Tiger is unique in that it doesn't matter what you name the file, because you can recall it later based on the keywords that you type in when you set up a file.

Say for instance you have a file and the 1st one is regarding your car. People could name that file Car, Auto, Ford, or Vehicle. So you could possibly have 3 or 4 possible names for the same file. In a traditional filing system, when you go to look for that file, you might look under A for Auto, a little further back for Car, a little further back for Ford, and then a little further for Vehicle. So it might take you a few minutes to go through all your files, because you don't remember what you filed it under. Nevermind if someone else needs to find it. They might just give up because they wouldn't think to look under Ford.

So Paper Tiger allows you to set up a file under any name and then use keywords that will help you find it later. Kind of like a Google search where it goes to the index of all the keywords and finds your file. So that's a little bit about the methodology.

When I realized how awesome this system was, I realized that this was the key element of all of my clients that I've worked with over the last 10 years. Honestly, I want to say 90-95%, if not all of my clients use Paper Tiger because once they see it and work with it, they realize it is the smartest way. It's quick and easy and naturally makes sense.

Paper Tiger can get your paper under control, so how do you deal with what's on your hard drive, how do you deal with what is in my email account. People say, I want to find my digital files, but they are all over the place. Kind of like your paper files have been all over the place, so has your electronic files been all over the place. Well The Monticello Corporation has figured out a way to create an application that works with Google and allows you to incorporate your electronic files with your Paper Tiger filing system so that when you're looking for a document, whether it is electronic or paper, and it's within the eco-system of this system, you will be able to find it.

Once you have a Paper Tiger Online account, you are signed in and the first screen you see is the Dashboard. You will be able to see what's going on in the Notice and Welcome sections. The Monticello Corporation will update these sections when there is something going on so you'll always be in the know.

On the right side column of the Dashboard, you will see where you can create a new database or import an old database. For those of you who previously had the desktop version of Paper Tiger, you can import your old database. When I refer to the desktop version, there are people who have had Paper Tiger for years, and it is where the software is on just one computer. So that means it's desktop. What we are demonstrating today, is the version of Paper Tiger that is web-based software. So if you'd like to get off of being

limited to one computer and be able to access Paper Tiger from any computer, I recommend you purchase Paper Tiger Online and import your old database.

To get started, you want to create a new database. The definition of a database is essentially the organization or entity in which you are going to be indexing all of the files. Once you name your database, you will see a link to open that database from the Dashboard. You can have different databases for different things, such as your office files, your home files, etc. Or larger corporations might have a multi-user plan in which they want different databases for employees that do not share the same file cabinets.

After your database has been created, you then need to begin to add Locations within the database.

In setting up your files in an office environment, generally people think of their files as simply files. They really never thought of their files as a function. For instance, I would go into a client's office, and I would see 3, 6, 12 drawers and they would have papers everywhere. I would look at their drawers most accessible to where they were sitting and they would have everything in A through C files. So I say to them, "how often do you access those files that are closest to you?" And they'll say, "I use some of them, but I don't use all of them."

So my next question to them is, "do you have current projects that are more important that you're jumping all over the place in your office looking for them?" They respond, "yes, that's everything all over the top of my desk."

What we do is think about the projects you just mentioned, and let's set up a new Location and let's call these Action, and these hanging files will be placed in the most accessible location nearest to you. In this case, 'these are the files in the top drawer to the left of Anne's computer' with capacity of 30 items.

For files other than current projects, we are going to create a Location called Reference, and in this case 'these are the files in the bottom drawer of the filing cabinet to the left of Anne's desk' with capacity of 30 items.

With any filing system, one of the biggest problems is the lack of completion. People don't continue to maintain a filing system after that first day they get started, because it's kind of a pain in the neck to create a new file when they want to put something away, and they have to think what to name the file. So they don't do anything and that's why the stacks of paper start piling up again. But Paper Tiger has given us a great solution where you can print labels from the Locations we just created. I use the Avery label 5167 or 8167. So you print the labels for the locations you are setting up files for, and then stick the labels on the white tabs that come with the hanging file folder plastic tabs. In this case, you will have 30 hanging file folders with tabs Action 1-30 (Action 1, Action 2, Action 3, etc.) You'll set up the drawer files with all of the Location Item numbers in each hanging file folder so that the file folders will be waiting on you. So it won't be a problem when you need to file something new.

If the drawer location most accessible and nearest to you is not where your projects are located, pull the files out of that drawer and place them in a box to index later in your Reference file location. Then place the Action 1-30 hanging file folders into that drawer nearest you. Then begin to index your current projects into these Action folders by typing in

an Item Name for each project, and type in any additional keywords into the keywords section that you might possibly have filed each one under. For instance, you might be working on an auto claim. You might name the action file "Auto Insurance Claim" and keywords might be "Allstate, temporary change of deductible".

You might have your insurance policy that is not a current actionable item or file, so you can click on the Jump to Location, to go to the Reference Location. Add Item for "Insurance", with keywords "auto, allstate, policy", just adding any keywords that will help you find that file later when you need it.

Continue with indexing each file starting with what you have on the top of your desk, and what you've boxed up or have in your other drawers. That's the process of getting the paper organized.

Locations within your database can reference the function or type of the files or could be the physical location of a storage unit such as a Holiday Box.

Now to be able to activate Digital Tiger, you'll need to have a Google account or Gmail account. If you don't already have a Gmail account, go to Google.com, click on Gmail and you will see the option to set up a new account.

When you activate Digital Tiger, by connecting your Paper Tiger Online account to your Gmail account, you will be able to conduct a search from Paper Tiger Online and search results will present both your paper or physical items that you've indexed into Paper Tiger, and also your digital files that you have created in Google Docs format.

When you conduct a search for 'car', you will see my Google Docs that I have 'car' in the files, and my files in Paper Tiger that I've included keywords for 'car'. In the search results under the Google Docs the section, I can click on the link for any of the files and the document will be opened in Google Docs.

This is just change management in where you store your digital files. You can upload your digital files to Google Docs by individual files or by folder.

Based on what I see with clients when trying to go paperless, once they get over the fear of not finding digital files after they've scanned them, then naturally it makes sense to go paperless. You will need a scanner and you will need a Gmail account. The key to going paperless is that you will be incorporating a different mind-shift in saying from this point going forward, you're going to feel comfortable using electronic files.

If you're not sure why you're going paperless and you want some security in understanding in how to deal with certain things, there might be just one type of document that you have that you're afraid of letting go of in paper format and maybe I can help you understand how to overcome that, but that's also the reality though of why Paper Tiger will still be a viable tool because there are oftentimes papers in everyone's life that they have to hang onto in paper format. So Paper Tiger will always be necessary for the paper files that you do need in hard copy format.

Q: Are you saying that every piece of paper I receive I should scan and then enter into database, and then file. If I get 100 items a day to file, how much time does it take to enter

every page? How much additional time does it take to enter the document into the database just for filing/indexing the physical paper file?

A: If you get in 100 pieces of paper a day, I'm not necessarily recommending that you scan it all, but if it makes it easier for you to access it later, I would. Personally, I would scan them and shred the documents. So if you can shred the documents and it's ok to let go of the documents in the original form, then I would let go of that. You do not need to duplicate the effort and also put it in Paper Tiger and file it in a paper file format. That would defeat the purpose overall.

It would most likely take the same amount of time whether you're indexing/typing in item name and keywords into Paper Tiger or scanning the paper files and uploading them to Google Docs, depending of course, on your scanner and Internet speed for uploading the digital file. Anne recommends an estimated time of 2 hours per drawer whether you are tossing the files, scanning/shredding, or indexing them into Paper Tiger. Maybe 2 hours for tabletop and depending how many files are on the floor, maybe another 2 hours. Anne said, "I have worked in some of the messiest offices and after 8 hours with any one of them, they are completely organized."

A question that comes up often is security of Google. Some say they don't want to move everything to Google or they don't feel safe with their digital files in the cloud, but I want to reiterate the assurance and research by The Monticello Corporation and why they chose Google. Google apps offer the highest level of security and they wouldn't be the company that they are today. Google has the most robust system and network for digital cloud storage, the most robust and well-distributed data centers in the world, and their priority is the data and intellectual property of all the clients that are using their services. Google has around the clock supervision and monitoring of all data. For the last few years that I've been using Google, I cannot think of a time when my files were not accessible.

In addition to security and accessibility, Google has the lowest cost digital cloud storage on the market. The cost factor was one thing that we kept hearing in our survey responses is that people needed a low cost document management system for their digital files as well as their paper files. Our management team researched over 40 different companies, and Google was by far the cheapest and most accessible.

Google is the digital file storage location, Paper Tiger is not where your digital files will be located. Paper Tiger is for indexing your paper files that you need to keep in hard copy format and other items, such as instruction booklets, or CDs, DVDs, Books, home or office inventory and/or storage, etc. Your Paper Tiger database is housed on our secure servers hosted by Amazon Web Services. We have 99.9% up time and Amazon does as well. We back up those servers nightly on Amazon, and as an additional backup, we have an encrypted back up system in-house.