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## Kiplinger's Taming the Paper Tiger™

*An exclusive information package designed especially for you  
by Elizabeth Hagen, Professional Organizer/Speaker*

Greetings!

Thank you for expressing interest in The Paper Tiger software. It is truly one of the most outstanding organizing tools I have ever found.

This document will provide an overview of how the software works, as well as some photos of files and some screen shots of what the software actually looks like. I encourage you to read through to the end to get a complete picture of how this amazing software works...and to see just how versatile it is. You'll find that you can use The Paper Tiger for *much more* than just paper!

### WHY THE PAPER TIGER?

For years, "getting organized" has been listed as a top New Year's Resolution for many people. An American Express survey of small business owners revealed that "getting organized" ranked among the top three priorities for the year 2000. Many plan to schedule sessions with organizing and time management experts in an effort to learn how they can be more efficient and effective, especially with information management.

So if "getting organized" is such a priority for people, why do so many people struggle with this?

We're all flooded daily with information coming at us from many different directions. We save much of it because we believe we *need it* to do our jobs better or to respond to our customers more effectively. Having the information on hand is of little value, though, if you can't *find what you need when you need it*. And having information organized and readily available frees us up to do other things.

The Internet has done wonders for improving our ability to find information. By doing a search of a few key words, we can instantly receive suggestions on where to find web sites containing the information we're looking for. That's fine if all you need is information from the Web. But what about the paper, books, articles, CDs and other information sources in your office that you've collected over the years? **Wouldn't it be great if you could find them as quickly as an Internet search engine can find web sites?**

**Now you can!** Kiplinger's Taming The Paper Tiger is a great solution for managing information. The Paper Tiger™ enables you to file and retrieve hard copy documents, books, CDs, and other items – literally anything in your office that you can put a number on – by using key words. As you create a new file, you simply enter one or more key words that come to mind regarding that file. When you want to find it again, type in any of the key words associated with that file, and within **FIVE SECONDS** the computer tells you exactly where the item is located.

Items you want to track can be divided into several locations – or groups of similar things -- such as Active (your most active reference files), Reference (your less active reference files), Archive (your seldom used reference files that you need to keep for legal or historical reasons), Books, Magazines, Videos, CDs -- whatever items you choose to store together.

Since the system tracks all the information by item name and keywords, you can easily check on the contents of files with the built-in search engine that comes with the software. That makes it feasible to keep archived records off site, perhaps in a storage facility, yet still know what's in each container at all times. The Paper Tiger can also generate a file index so you can print out a list of all your files by name and keywords. The printed back-up allows for quick reference when the computer isn't on.

## **NOW AVAILABLE FOR NETWORKS AND WORK GROUPS**

The software comes in both stand-alone and network versions. The network version is especially effective for teams or work groups. For example, a project management team of dozens of people can create just one centralized set of files. As people contribute new information to the files, they enter a few keywords that describe the information. Other team members can then find the information instantly without assistance. By sharing a central set of files, the expense, time and effort of duplicating information are no longer necessary. And each team member in the workgroup does not have to call a file by the same name, because the Paper Tiger search engine will find it under any of the key words associated with that file.

Clients who use The Paper Tiger tell me they especially appreciate the fact that disruption caused by employee turnover is minimized because the filing and retrieval system is standardized, rather than dependent on how a particular employee works or what the previous employee called something. The multi-media tutorial included with the CD ROM is usually all that's needed to train new users. Perhaps the greatest benefit of using The Paper Tiger is the reduced stress level that comes with being able to instantly find what you need when you need it.

I've created and implemented many different organizing systems over the years, but I've yet to see one that addresses the variety of needs I encounter with my clients as well as The Paper Tiger does. Whatever your motivation for getting organized -- whether it's to save time, eliminate clutter, increase productivity, or just find a better way to retrieve information -- The Paper Tiger is a great tool. And you have my 100% satisfaction money-back guarantee -- for the software and for my services if you need them.

Scroll down to see how the software works. After you have reviewed this, I'd be happy to answer any questions you have.

Happy Paper Taming,

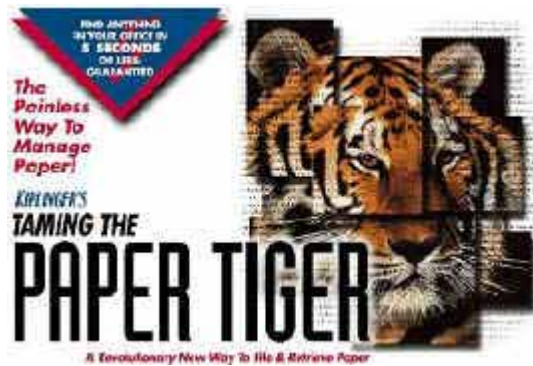
*Elizabeth*

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“ I think this product economically solves one of the oldest problems small companies face -- to get the information you want when you want it! ”

-- Gary Troutman  
President,  
WebTransit, Inc.

**Powerful software combined with a proven system for filing and retrieving paper!**

Below is a typical screen view of the Paper Tiger browser screen. Please note the variety of the LOCATIONS I have created in this demo database: **Action** (the one that is open in this screen shot), **Archive**, **Binder**, **Book**, **Fireproof**, **Personal**, **Reference**, **Software**, **Trash** (not a physical location), **Video**. If I want to view the contents of any other location, I just click on the corresponding tab and it opens right up.

Kiplinger's Taming The Paper Tiger 2.0 - Demo Database.ptd - Single User Version - [Browser]

File Edit View Browser Locations Categories Reports Window Help

Fast Find Browser Find Locations Categories Confirm Help Tutorial

New Edit Transfer Loss Print Close

**Action** Archive Binder Book Fireproof Personal Reference Software Trash Video

Action items ( 10 found )

Location	Item Name	Keywords	Category	Action Date	St
Action 1	NAPD Conference Workshop	talk outline, Teaching Clients by Example: Managing Your Time & Your Life (4/27/02), 2002, PowerPoint presentation, handout, AV request form, introduction	Speaking		In
Action 2	NAPD Membership	NAPD directory, member # 2827, www.napo.net	Business		In
Action 3	Paper Tiger	user manual, CD Rom, serial #PTS 1023 1065 1304, notes from meeting with developer re: version 2.0 updates, PTAC agreement	Business		In
Action 4	Newsletter Ideas	future newsletter topics, magazine articles, clipart, clip art	Business		In
Action 5	Telephone	Verizon voice messaging service user guide, Accxx Long Distance, Qwest cellular phone contract, monthly phone bills	Business		In
Action 6	Receipts -- 2002	business expenses for 2002	Finance		In

Locations Categories Reminders Search Results

start 10:05 AM

LOCATIONS are simply a way of grouping things that are stored together. Each grouping uses numbered containers – such as numbered files, boxes -- or anything you can put a number on.

## Talk about versatility!

*If you can put a number on it*, The Paper Tiger will tell you where it is located! Let me demonstrate the versatility of this software with an example.

An east coast tow truck company is using the Paper Tiger to find cars in their lots. Here's how it works. They have created a location called STALL in their Paper Tiger database. Once a car is towed into their lot, they park it in a numbered stall (Stall 1, Stall 2, etc.) until the owner comes to claim it. Company employees enter the year and model of the car as the Item Name. In the Keywords section, they add additional descriptors -- color, VIN number, license plate number, etc. When the customer comes to retrieve the car, it's easy to find which stall it was parked in...without having to roam up and down the rows of parked cars doing a visual search for it. The employee simply does a quick search in The Paper Tiger database -- based on a description or license plate number -- and the car matching that description comes up on the screen, with the stall number indicated. If the police call to see if they have a particular stolen car parked in their lot, they can do a search for the VIN number and provide the police with an immediate response.

## Still not sure what a Location is, as defined by the Paper Tiger?

In the Paper Tiger, a LOCATION is a group of similar things that are stored together, such as files, CDs, books, cars (as in the example above) -- anything you can put a number on.

Sometimes the name of the location gives you a strong clue about where it is physically located. For example, the location called FIREPROOF is for hanging files located in a fireproof box. In case you cannot read the labels in this photo, they say Fireproof 1, Fireproof 2, etc.



The red file in the front is titled File Index, and this is where the printout goes which provides an alphabetical listing with the contents of this location.

Sometimes the name of a location does not tell you where the location is physically located. For example, Reference may refer to your reference files, which are physically located in the lateral file cabinets in your office.



The BINDER location pictured below tracks notebooks by title and table of contents (or whatever you choose to enter as keywords). Each binder has a number on the bottom. This client wanted the binders to be physically labeled with the item name. The same labeled item name is also entered into the Paper Tiger. When a word search is done for the subject matter covered in any of these binders, the appropriate binder comes up in the search results by binder number, along with any files, videos, CDs, etc. that also contain that word in the Item Name or Keyword.



The **Location List** screen provides a description of where each “Location” is physically located. It also tells you how many files or items you’ve created for each location, and how many are open (empty). There is no limit to the number of items you can create for each location.

Kiplinger's Taming The Paper Tiger 2.0 - Demo Database. ptd - Single User Version - [Location List]

File Edit View Browser Locations Categories Reports Window Help

Fast Find Browser Find Locations Categories Confirm Help Tutorial

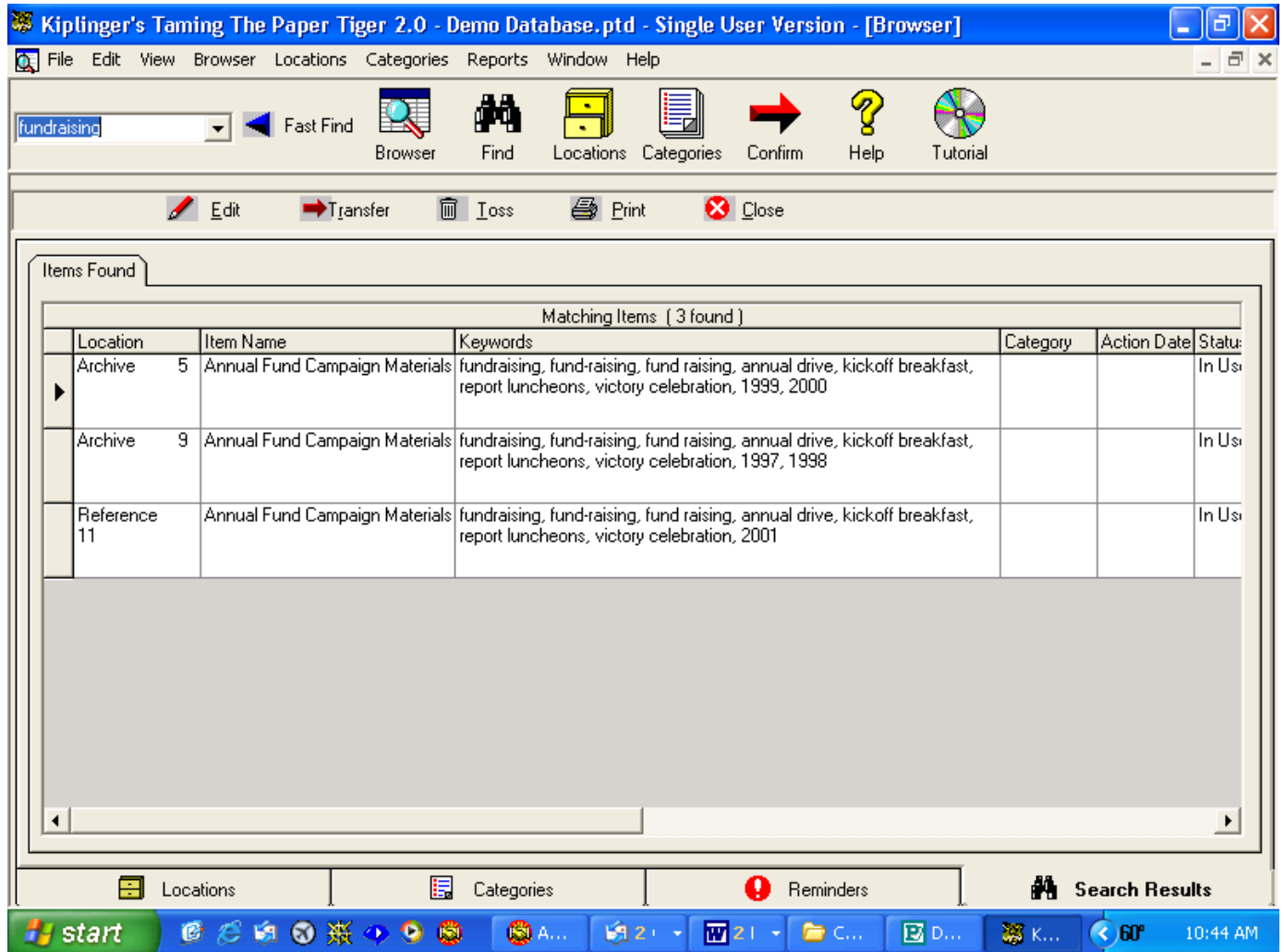
New Edit Delete Browse Print Close

Location	Viewable	Capacity	# Open	Revie	Notes
Action	Yes	10		None	Located in Kathy's desk drawer
Archive	Yes	10	1	None	Located in banker's boxes in storage room
Binder	Yes	10			Located on top of credenza behind desk
Book	Yes	25			Located on bookshelf in Kathy's office
Fireproof	Yes	10	3		Located in fireproof box in back office
Personal	Yes	10	7		Located in file cabinet under desk
Reference	Yes	15			Located in 4-drawer file cabinet in Kathy's office
Software	Yes	20	8		Locate in the software cabinet in the storage room. You must check all software out with Susan.
Trash	Yes	0			The Paper Tiger places information that you toss into this location, so that later you will know that you tossed it!
Video	Yes	10	5		Located in credenza behind desk

start ACTI - ... Paper T... Profess... Kiplinge... 69° 3:39 PM

## FIND WHAT YOU'VE FILED...INSTANTLY!

In the white text box on the upper left corner of the screen, you'll type a word for the item you want to find and hit ENTER, or click the FAST FIND button next to the text box. Paper Tiger will instantly find and list all of the items that have that word associated with it. In the example below, I looked up the word *fundraising*, and three items came up – Archive 5, Archive 9, and Reference 11. Once I determine which of these three files is the one I want, I can easily go to retrieve the file.



## ON THE ROAD? NO PROBLEM!

If you are away from the office and someone else needs to find a file, this system makes it much easier for them to do so. They don't need to know what you called the file, provided that they can think of ONE word that is associated with the file.

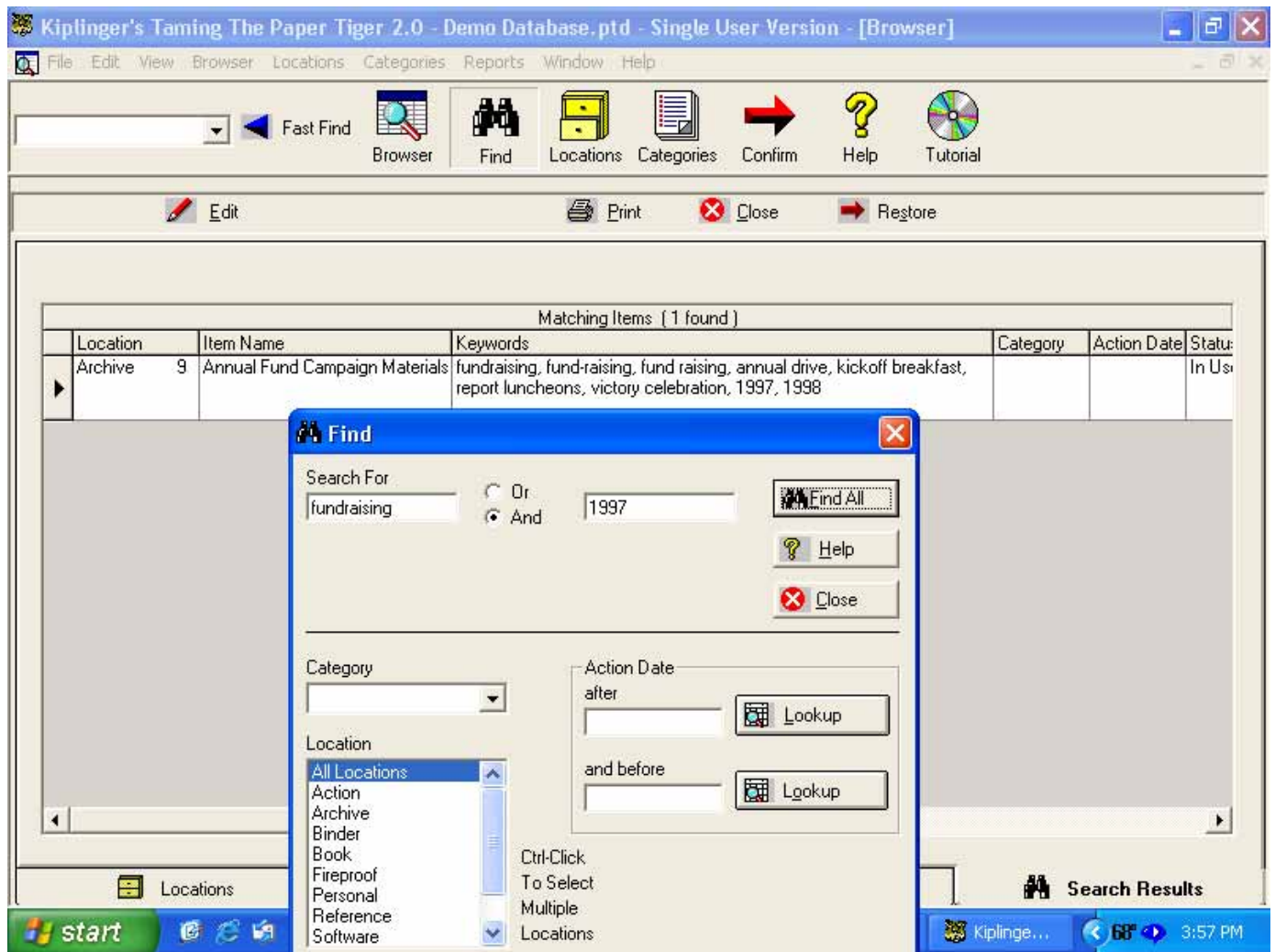
If you travel and need to access your files remotely, you can find the right file on your laptop copy of the Paper Tiger, and then call the office and ask someone to fax you the contents of the file you need.

## EMPLOYEE TURNOVER? NO PROBLEM!

This system makes employee turnover much less painful. In most office settings, when the person who created the filing system leaves the company, nobody can find anything!

## SEARCH FUNCTION

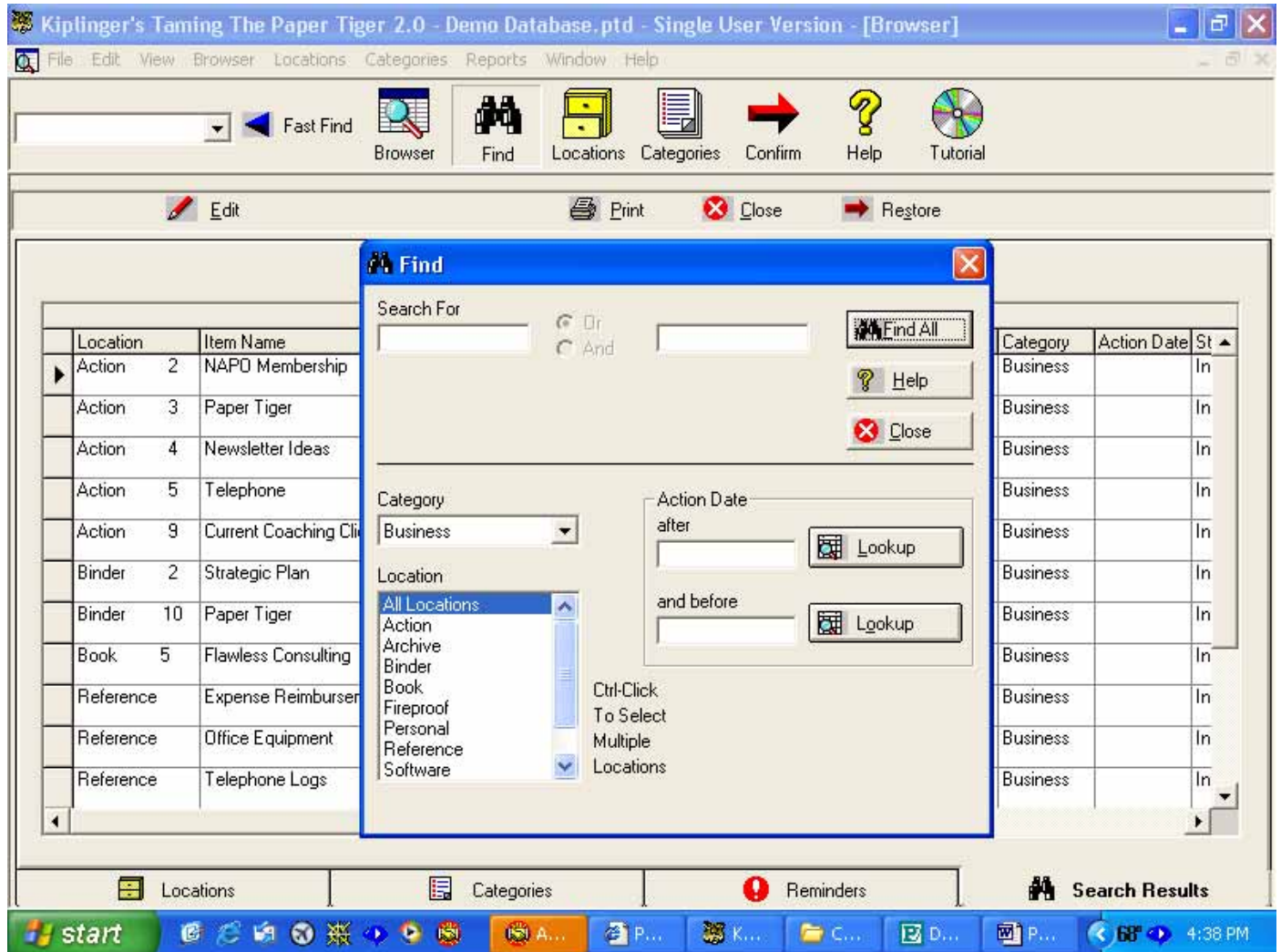
Let's say that I've just looked up a word that I use a lot – a word that is associated with 25 different files in my system. I would not want to have to scroll down through a long list of files to find the specific file I am looking for. In this case I'd use the binoculars FIND button, which enables me to either **broaden** my search (fundraising OR campaign – it will find *either word*) or to **narrow** my search (fundraising AND 1997 – it will only show item names which use *both words* to describe it).



The “binoculars” search for *fundraising* AND *1997* narrowed the search criteria to one file -- Archive 9 -- the file containing both words in the descriptor. With this system, I can easily delegate the physical retrieval of this file to someone else. Going back to the Location List, we see that Archive files are stored “in banker’s boxes in the storage room.” Each storage box is labeled for its contents - in this case the box is labeled *Archive 1-25* -- so anyone with access to the storage room can find Archive 9 easily. Voila -- a file is instantly found!

## FILE CATEGORIES

You can create as many file categories as you wish, thus making it possible to search for files by category. Some common categories include **Medical, Legal, Financial, Personnel, Client, Marketing, Personal, Business**. Below you will see a search that I did for the category *Business*. The search yielded files from several locations, including items in Action, Binder, Book, and Reference locations.



If you want to narrow your search for something more specific, you can do a particular word search within the category.

## PAPER TIGER HANGING FILES

Here's what some of the physical hanging files look like for the Reference location. Each location has its own set of numbers, and each file location can be color-coded, although this is not necessary. Each file label has the location name and number on it. The great news about this system is that once you've labeled these files, you'll never have to label them again. Although the contents may change, the physical label on the hanging file will always remain the same...in this case Reference 1, Reference 2, etc.



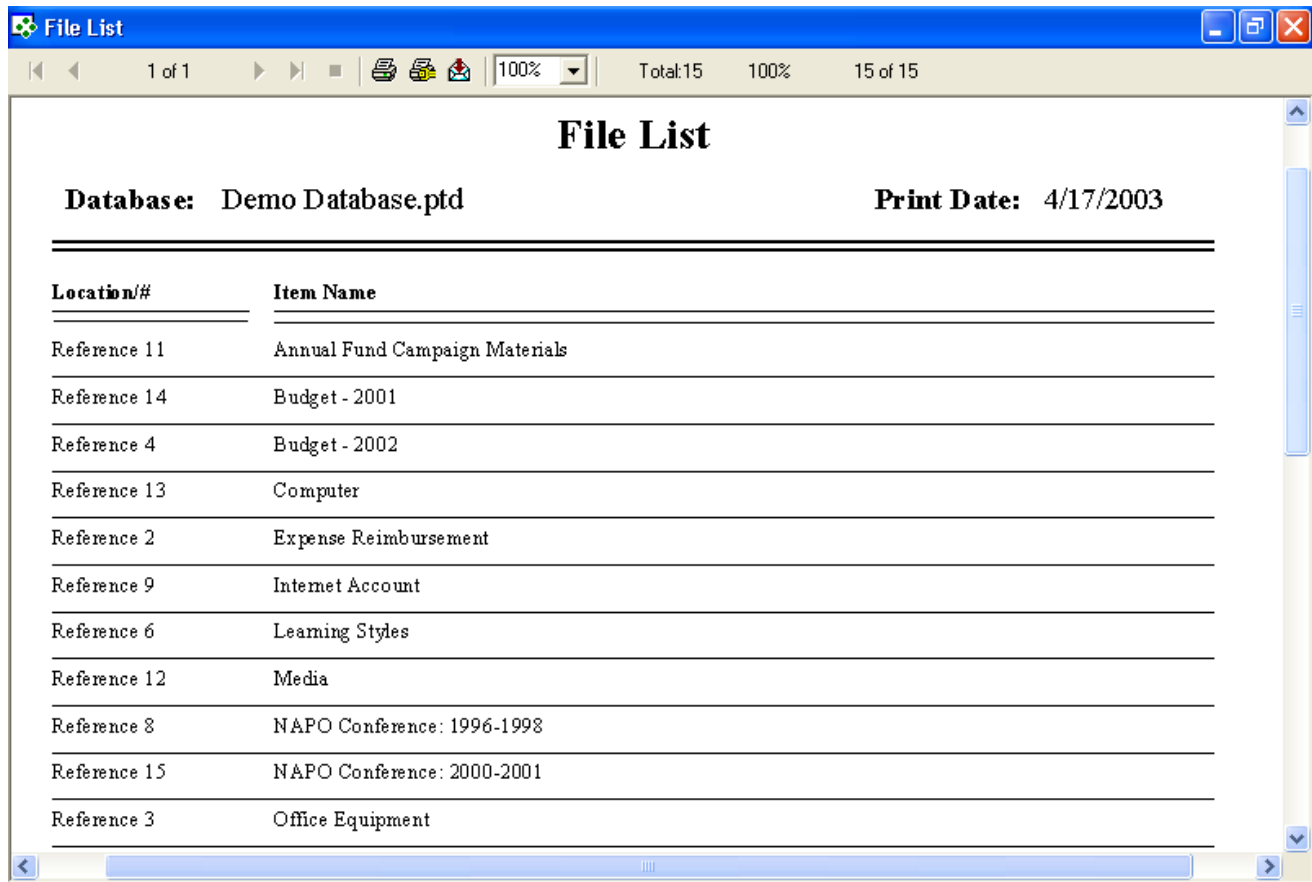
Internal (manila) files are not needed to hold the contents of each hanging file. There are two exceptions to this:

1. Manila folders can be used to sub-divide contents in a file. Reference 8 (pictured above) has manila files to subdivide the contents. In this case, the name of the file for Reference 8 is *NAPO Conferences*, and the sub-divided files are for *NAPO Conference 1996*, *NAPO Conference 1997*, *NAPO Conference 1999*.
2. For active projects that you'll be retrieving regularly, you may want to use a manila folder to keep the working documents together while they are on your desk. You can write the file number on the manila folder to make it easy to return it to the appropriate numbered hanging folder when you are finished working on it.

Notice the red **FILE INDEX** file found in the front of each location. This is where the printed file index goes. That way, if your computer is off or the power is out, you have a handy backup to see the contents of each file.

## REPORT TEMPLATES

There are a number of report templates built into the software. This is what FILE LIST report looks like. I print these out each time I have made significant changes to the database, and I store this in the red FILE INDEX file in the front of each location. A more detailed version of this report is the FILE LIST WITH KEYWORDS report.



**File List**

**Database:** Demo Database.ptd      **Print Date:** 4/17/2003

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<u>Location/#</u>	<u>Item Name</u>
Reference 11	Annual Fund Campaign Materials
Reference 14	Budget - 2001
Reference 4	Budget - 2002
Reference 13	Computer
Reference 2	Expense Reimbursement
Reference 9	Internet Account
Reference 6	Learning Styles
Reference 12	Media
Reference 8	NAPO Conference: 1996-1998
Reference 15	NAPO Conference: 2000-2001
Reference 3	Office Equipment

## FILE RETENTION

Another popular report is the File Cleanout Guide. I recommend running this report – by location -- at least once a year to remotely review the files for various possible tasks: REVIEW, TOSS, TRANSFER to another location (such as Archive), or NONE. The software includes a built-in transfer function to make transfers very simple from one location to another.

**File Cleanout Guide**

**Database:** Demo Database.ptd      **Print Date:** 9/5/2002

Location + Item Id	Item Name	Action Required				Keywords
		Review	Toss	Transfer To	None	
Reference 11	Annual Fund Campaign Materials	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	fundraising, fund-raising, fund raising drive, kickoff breakfast, report lunche victory celebration, 2001
Reference 14	Budget - 2001	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	projected income & expenses, 2000 P statement
Reference 4	Budget - 2002	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	projected income graph, 2001 actual b P&L statement 2001
Reference 13	Computer	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	user guide, software license for Office monitor, speakers, HP laser printer, V scanner
Reference 2	Expense Reimbursement	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	Paauperfully Organized receipts for 2 travel, reimbursed byclients
Reference 9	Internet Account	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	DSL, setup instructions, technical sup www.theflowerfam.com
Reference 6	Learning Styles	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	article, notes from Cynthia Tobias bo
Reference 12	Media	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>	1999, 2000, 2001, press releases, pub

You will notice that the Item Names (the file names, in this case) are listed alphabetically. The file numbers are not in numerical order because the files no longer have to be stored alphabetically. This makes filing so much easier! Anytime you want to see an alphabetical list of your files, with one click the Paper Tiger will alphabetize them for you.

Here is a screen shot of the Reference files in **NUMERICAL** order.

The screenshot shows the software interface with the 'Reference' tab selected. The table below displays 15 reference items sorted numerically by their 'Reference' ID.

Reference	Item Name	Keywords	Category	Action Date	St
Reference 1	Roth IRA	investments, retirement, stocks, E-Trade, E*Trade	Finance		In
Reference 2	Expense Reimbursement	Paauwerfully Organized receipts for 2002 travel, reimbursed by clients	Business		In
Reference 3	Office Equipment	user guides, user manuals, instructions, pencil sharpener, Brother P-Touch label maker, Nikon digital camera instructions and CD Rom, Panasonic two-line telephone user manual, headset warranty, paper	Business		In
Reference 4	Budget - 2002	projected income graph, 2001 actual budget, P&L statement 2001	Finance		In
Reference 5	Telephone Logs	log of phone messages for 2001	Business		In
Reference 6	Learning Styles	article, notes from Cynthia Tobias book	Coaching		In
Reference 7	Taxes - 2001	business receipts 2001, Washington State quarterly tax returns, B&D	Finance		In

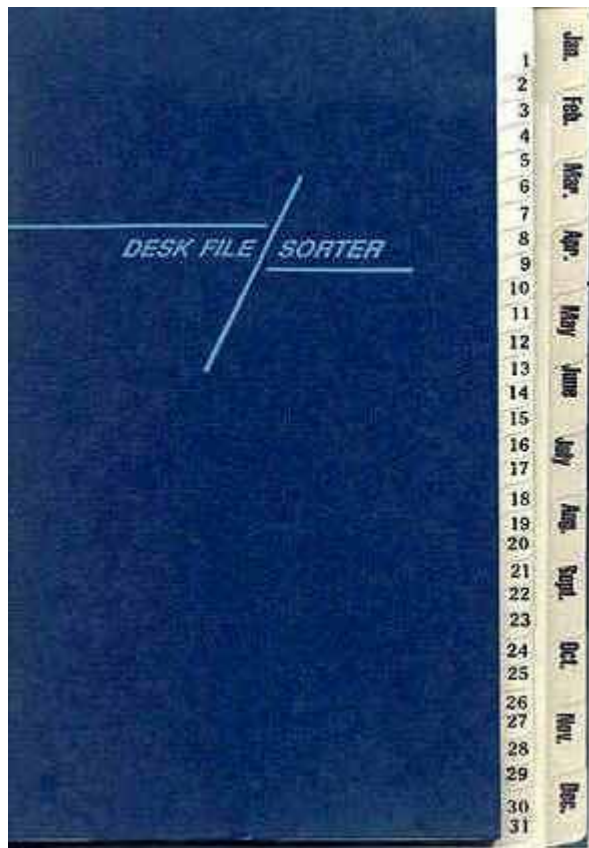
With the click of a mouse, those same Reference files are in **ALPHABETICAL** order.

The screenshot shows the same software interface, but the 'Reference' items are now sorted alphabetically by their 'Item Name'.

Reference	Item Name	Keywords	Category	Action Date	St
Reference 11	Annual Fund Campaign Materials	fundraising, fund-raising, fund raising, annual drive, kick-off breakfast, report luncheons, victory celebration, 2001			In
Reference 14	Budget - 2001	projected income & expenses, 2000 P&L statement	Finance		In
Reference 4	Budget - 2002	projected income graph, 2001 actual budget, P&L statement 2001	Finance		In
Reference 13	Computer	user guide, software license for Office XP, monitor, speakers, HP laser printer, Visioneer scanner	Business		In
Reference 2	Expense Reimbursement	Paauwerfully Organized receipts for 2002 travel, reimbursed by clients	Business		In
Reference 9	Internet Account	DSL, setup instructions, technical support, www.theflowerfarm.com	Business		In
Reference 6	Learning Styles	article, notes from Cynthia Tobias book	Coaching		In

The Paper Tiger does even more, but I'll stop here for this online demo. It is very easy to learn and to navigate around. **And I guarantee that you will be happy with it. If, for any reason, you decide it's not for you, simply return it and I will send you a full refund.**

In addition to the software, I also highly recommend that you have a customized tickler file system to manage the things requiring your attention or follow-up.



This hard-to-find letter-sized filing system has reinforced tabs for durability. I've been using mine for more than three years and it still looks new! It has 43 pages that are indexed 1-31 for each day of the current month and January-December for each month of the year. As you can see below, it expands quite a bit as you add things to it.

To get in the habit of checking this daily, I recommend that you schedule a daily "appointment" in your calendar that says "Check Tickler." Do this at the same time everyday for a month and you will have formed a new habit!

You can stand the system up in a desktop file frame or place it in your desk file drawer -- wherever it is easiest to check it on a daily basis.

No more "I'll just set it here for now"... those piles of paper cluttering your desk or floor will have a new home! Now you'll have a place for phone messages, tickets, claim stubs, bills, receipts... anything that requires action by you! Sales and marketing people have been using similar tickler systems for years to remind them of important follow-up.

You can purchase The Tickler File System at [www.TheTicklerFile.com](http://www.TheTicklerFile.com).

This expands quite a bit as you add paper (photo is of bottom of tickler file).



I offer a number of Paper Tiger packages that include the tickler system pictured above. Or you can arrange for as little as one hour of my time for a private consultation by phone...or a few hours or a few days of my time in your office. Let's schedule a time to talk, and we can determine which package best fits your needs. Please e-mail me at [elizabeth@ElizabethHagen.com](mailto:elizabeth@ElizabethHagen.com) to schedule a time to talk.

**Elizabeth Hagen ♦ Professional Organizer/Speaker ♦ Sioux Falls, SD  
605.357.8767 ♦ Paper Tiger Authorized Consultant**