

How to go paperless the future-proof way (without using Evernote)

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The short version:

- Get a Doxie One scanner¹. For (optional) convenience, get an Eye-Fi SD card² for \$35, which will send documents from the scanner to your computer wirelessly and automatically.

Update: If you want to cut your scanning time by more than half, spend a few bucks more and get the Canon P-215 scanner³ (as recommended⁴ by The Wirecutter). It scans twice as fast, it scans both sides of the page at the same time, it has a document feeder, and it has built-in OCR.

- Scan your documents to your hard drive. Put them all in one big folder. If you want, use the OCR option in Doxie's software to make your PDFs searchable.
- Date and tag the documents: use this format for filenames: [year] - [month] name of document #tag1 #tag2 #tag3.pdf
- Get an expanding file jacket⁵. Put all your important papers in there and out of the way, and scan them all once every quarter or so (I usually do my scans once a year just before I do my taxes).
- Shred the original documents.
- Keep backups.

When you want to run a search, open your archive folder and run a search. Need all tax-related documents for last year? Search for 2012 #taxes.

No subscriptions. No extra software. Guaranteed to be stay portable and useful for the next 20 years.

1. <https://amzn.com/B008ASBFM6/?tag=thloya-20>

2. <https://amzn.com/B003DV4234/?tag=thloya-20>

3. <https://amzn.com/B00671E4B2/?tag=thloya-20>

4. <http://thewirecutter.com/reviews/the-best-portable-scanner-is-the-canon-p-215/>

5. <http://www.amazon.com/gp/bestsellers/office-products/1069596/?ie=UTF8&camp=1789&creative=390957&linkCode=ur2&tag=thloya-20>

Why the hashtags? What about folders?

Using `#tags #like #this` in the filename is a universal tagging mechanism. It works on Mac OS and on Windows, and the searches on those systems will have no problem finding your files.

Sticking files in a folder hierarchy is a poor way of filing that is on its way out. For example, what do you do if a document is both medical and tax-related in nature? Do you create a `Taxes → Medical` folder structure, or `Medical → Taxes`?

Tags allow a document to live in more than one box at a time, are easy to add, and are easy to search for.

Why Not Evernote? Reasons, that's why.

There have been a couple⁶ of great⁷ posts⁸ by others lately about going paperless, and they're definitely worth reading. But they all assume you need some kind of fancy software setup, including (most commonly) a subscription plan to Evernote.

I agree it must be nice to have someone else run OCR on my documents and host them for me. But let's look at the drawbacks:

- I have to pay someone else \$60 a year in case I need to perform occasional full-text searches on my own documents.
- Long-term uncertainty. Will Evernote be around in 10 years? 20 years? How do I know I'll be able to get my massive archive back out again when they go out of business?
- Handing off responsibility for your sensitive documents to someone else's computers—this is just asking for trouble. Data corruption, security breaches, warrantless searches. Over the next 10 years, it's almost a given that your hosted service of choice will be hit by at least one of them.

6. <http://shawnblanc.net/2012/09/the-paperless-puzzle/>

7. <http://toolsandtoys.net/the-tools-and-toys-paperless-guide/>

8. <http://lifehacker.com/5973033/how-i-turned-three-years-of-paper-into-a-highly-organized-searchable-document-database-in-two-da>

Responses

You are that one person I was looking for, who went paperless without Evernote.

I have a question about your tags. Does your file name really look like you suggest in your format? If yes, how do you search these files in Windows OS? I do have Everything installed and use it quite often, still I can't figure out, how can I use hashtags to search? Any pointers? Thanks in advance.

(Noel, January 11, 2014)

On a Mac, you don't even need to use the #ugly #filenames : Tags are natively supported in the Finder since OS X 10.9 Mavericks, and you can add any number of tags to any file.

Better yet, if OCR has done its job properly, your PDFs content will all be indexed by Spotlight already (this has existed since 10.4 Tiger in 2004, I believe) : you can just search for them from anywhere on your Mac.

The indexing / OCR features of Evernote are really useful for Windows users who lack all of that functionality built into the OS.

(Renaud Guerin, February 28, 2014)

This is great! I have been concerned about Evernotes proprietary formatting.

(David Bennett, July 23, 2014)