

ACQUIRE A SEARCH PROGRAM OR A DOCUMENT MANAGEMENT SYSTEM

Even if you've created a good file naming convention, you'll still need help finding some documents. Now that you've created searchable PDFs, you can search through all of them at once, quickly, by searching for particular words. Here is a survey of your options:

WINDOWS SEARCH OPTIONS

Even if you've created a good file naming convention, you'll still need help finding some documents. Now that you've created searchable PDFs, you can search through all of them at once, quickly, by searching for particular words. Here is a survey of your options:

X1 SEARCH

RECOMMENDED: \$79/yr - See <https://www.x1.com/products/x1-search/>. Very fast searching of “desktop files, remote file shares, emails, attachments, SharePoint data, and more.”

COPERNIC DESKTOP SEARCH

See www.copernic.com. There are four editions of Copernic Search: Basic (\$20/yr), Advanced (\$33/yr), Elite (\$76/yr), and Server (contact them). Unless you're installing it in a very large firm, you only need the Basic edition. It does not search cloud-based email, but will search MS Office documents, PDF documents, and the major cloud sync vendors (Dropbox, Google Drive, and MS OneDrive). Copernic Advanced and above add the ability to search EPUB books, emails stored in Outlook online, and WordPerfect documents.

DTSEARCH

See www.dtSearch.com - \$199 - one of the most sophisticated and fast search engines I've ever seen. It provides the most search options and file types that it can recognize. If you need industrial strength search capability involving enormous numbers of documents, this is your program. If you use [PracticeMaster](#) as your practice management program of choice, it will [integrate directly with dtSearch](#).

WINDOWS INSTANT SEARCH

This is free and is included with Windows.

APPLE/MAC SEARCH PROGRAM OPTIONS:

HOUDAHSPT

\$34 - see www.houdah.com/houdahSpot.

PATH FINDER

\$30/yr - see <http://www.cocoatech.com/pathfinder/>.

SPOTLIGHT SEARCH: (MACOS)

This is included with the macOS operating system. For more information, see <http://support.apple.com/kb/HT2531>.

WHAT SEARCH PROGRAMS DO

Briefly, they read through all of the documents you've created in a word processor or scanned, and they build an index of the text contained therein. Once the index is built, you can search through all of those documents by either file-name OR the words contained inside them. When searching for words contained inside the documents, you can use the standard Boolean logic (and, or, not, etc.).