

SIMPLE IDEAS TO MANAGE YOUR DIGITAL FILES

Christina Nguyen, High Point Creative



A few years ago, my hard drive failed and I lost my precious wedding and honeymoon photos. About \$2,000 later, the data recovery service had them back for me. I won't ever let that happen again. And I don't want it to happen to you.

Data management is something we almost never think about, but it's becoming more and more critical as we create important digital assets – from photos and videos, to tax and financial records. Every year, our hard drives fill up with hundreds of files – many things we want and quite a few things we don't. Just thinking about all that data can feel overwhelming. Friends, family members and colleagues often ask me, “How do you manage your data? What should I do to keep my important files safe?” Here are some simple ideas and tips to help you get started. Now is the time to make a plan for how you manage your data – don't wait until a disaster strikes.

Start at the Source

As you create new files, sort them out right away. Don't let worthless data pile up. Practice good version control – tracking and managing editions (versions) of files. Do you need five copies of that PowerPoint plus the final? No. You might have a lot of extra space today, but if you keep saving hundreds of photos, pretty soon you'll fill your hard drive. Organizing is easier if you work in small chunks and sort frequently.

Organize in Your Own Logical Way

When you want that video from 2007, how are you going to find it? You need to develop a system of organizing that makes sense to you. That way, when you want to find a file, it will be easy. Save files in a way that fits *your* logic. For example, with my client files, I have a folder for each client company, then folders inside for each project. With photos, I sort them by year and then create subfolders for each month. Sometimes I make folders for a special event like a birthday party or holiday.

Back Up, Back Up, Back Up

Back up your files consistently and frequently to ensure you always have the data you need. Set a backup schedule and follow it – daily, weekly, monthly or whatever works for you. One easy way is to use software to automate your backups. Microsoft Windows has built in backup capabilities and there are many other backup software options out there. When it comes to backups, consider these two questions: “How much data can I afford to lose?” and “How concerned am I about losing that data?” If you would be OK with losing about one month's worth, then you could set a monthly backup cycle or even a weekly cycle. If you are very concerned about losing data, for example, if you are working with critical client files, then consider a backup system with a short cycle and more redundancy – make a backup of your backup, just in case. And finally, be sure to check your backup from time to time so you know it's working correctly.

Back Up to What?

Back up to an external hard drive. They are the most reliable option and relatively cheap, especially compared to the price of getting your data rescued from a data recovery service (remember my \$2,000 bill?). For most people, 250 or 500 GB is more than enough. Don't rely on CDs, DVDs or small USB key/thumb/flash drives. These media are too susceptible to failure. DVDs scratch. Tiny portable USB drives are easily lost or damaged.

Consider a Data Retention Policy

How long should you save your data? That's up to you. You might not need a formal data retention policy, but it does help to have a few basic guidelines. The most important thing is to be consistent. Save your client files for three years, then securely delete them. Save tax records according to IRS guidelines, then securely delete them. Remember to maintain an adequately secure environment for transferring or transporting data backups or archives. Don't write "bank information" on your backup disc and leave it out where someone could take it.

Backups vs. Archives

A backup is a data set that is changing frequently. For example, your active project files where data changes from day to day. An archive is for data that isn't changing. Your files are complete and you don't need to review them or access them frequently. When you archive files, you may consider making two sets, then storing them in different places. I recommend creating a list of what's in your archive. That way, you can remember what's in it.

Start Here: Save Your Data Today

If you can only do one thing, make it this one thing: buy an external hard drive and copy all your files onto it at least once. Then you have one point-in-time reference copy. It's a small investment that can really pay off.

Once your archive is set, you can delete the original source when you create an archive (after you ensure your archive has been properly created, of course!). This helps to reduce the amount of backup space you need. Then you can put your archives in a safe deposit box or another secure offsite storage facility.

Offsite Data Storage

Once you have some backups or archives, consider storing them offsite. Then if a catastrophe happens, you will likely still have your data. For personal data, give a copy to a friend you trust or put it in a safe deposit box. For business data, consider a remote office location or a secure storage facility. One more option – [cloud computing](#) – online storage that allows for access any time you have an Internet connection.

Basic Maintenance Prevents Trouble

Never underestimate the power of basic maintenance. Blow the dust out of your computer at least once a year with a can of compressed air. Clean out the back, or better yet, open the case and banish all the dust bunnies. Dust clogs up fans and other internal components, which can lead to overheating and failures – like hard drive failures. Also, remember to stay current with your software. You don't need the latest version, but if you fall behind too many versions, you may find that all that data you created cannot be migrated to the newest version of the software if you are forced to upgrade. For example, when you get a new computer, you'll probably have a new version of the operating system (OS). And your old copy of Quicken might not run properly on the new OS. You don't need to upgrade every year, but you do want to move to a new version every few years to avoid problems moving your important financial data.

Where to Start? With One Small Step

This seems like a lot to think about, I know. If you aren't sure where to start, then I recommend this approach: buy an external hard drive and copy all your files onto it at least once. Then you have one point-in-time reference copy. It's a small investment that can really pay off. Hard drives fail all the time. Looking for more ideas about data management? Let's talk. You can contact me at 651-653-6916 or christina@highpointcreative.com.