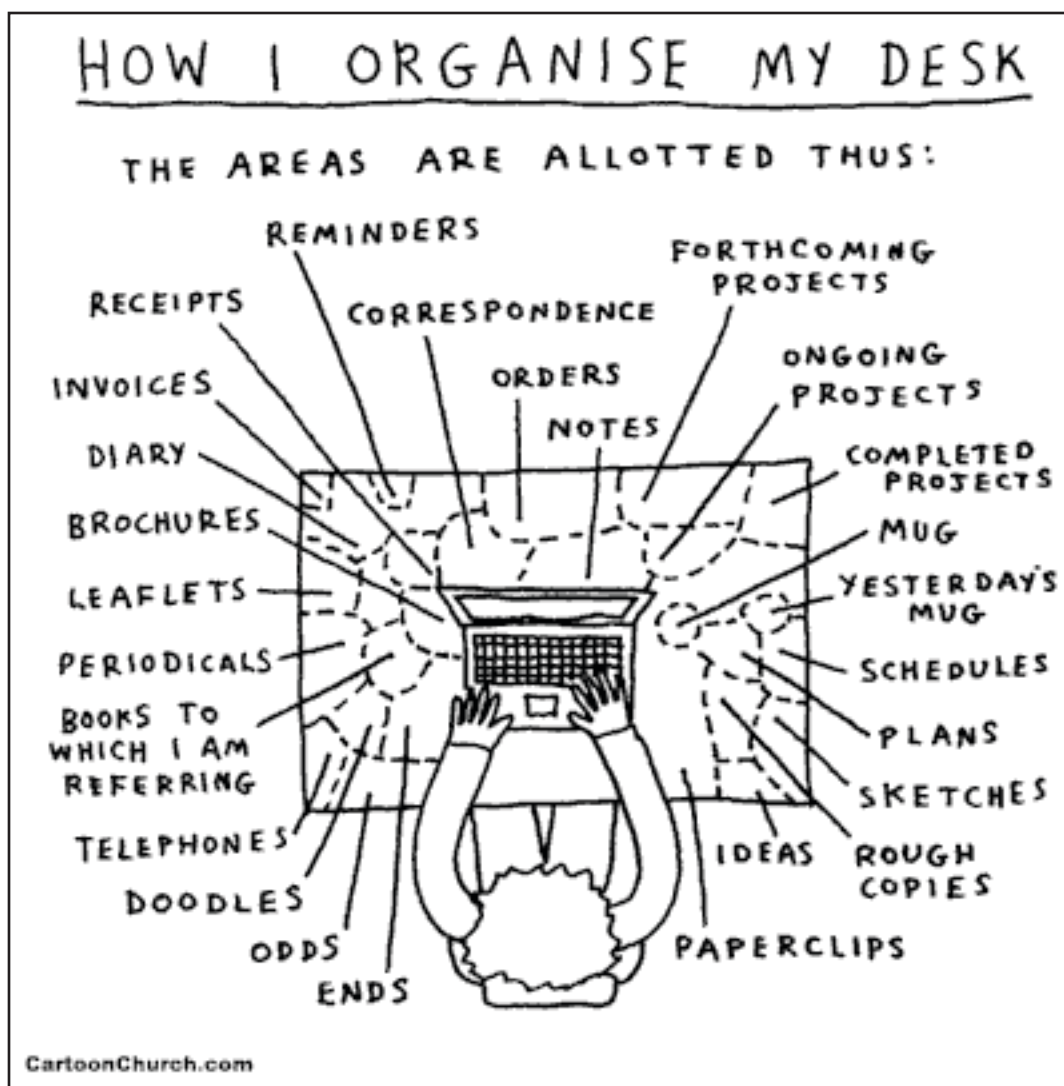




THE NEW YORK SOCIETY LIBRARY PRESENTS  
**DIGITAL ORGANIZATION**



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*One-stop shopping for advice and tips from a longtime digital organizer.*

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## TOP TIPS



Event Audio-Visual Questionnaire  
3.13.12

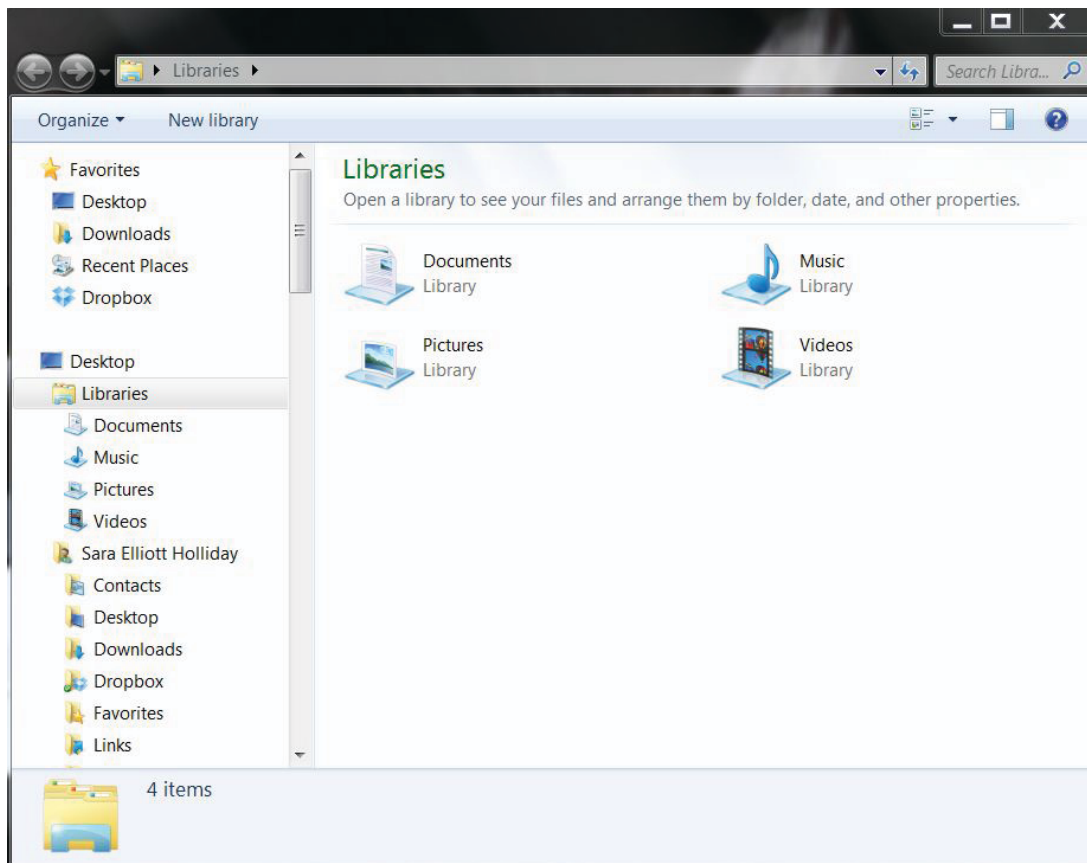


1. Date every file.
2. Archive/backup on a schedule (monthly is good).
3. Reuse and Recycle.
4. Almost nothing is miscellaneous.



# INTRODUCTORY THOUGHTS

*Digital organization sounds like the most boring activity in the world, but actually it can be very satisfying to optimize your digital space, find things easily, reuse what you can, and efficiently archive the rest.*



## WHEN IT'S ORGANIZED...

You know where to look for it.

You don't have to move something to get it.

You can tell someone where to find it.

You know where it should be found...  
even if you've never gotten it before.

You know where to put it back.

You don't have to move something to put it back.

You can tell someone where to put it away.

You know where it should be put away...  
even if you've never put one away before.

—Wallace Judd

# I. NAMING FILES

In Windows, file names can be as long as you want within reason. No need anymore to call a file

**STFFLST.doc**

A better alternative would be

**In-House Staff Contact List as of 10.28.11.doc**

Spaces can be used in file names, as above. So can the following:

Periods/Dots

**Balanchine and His Cat 2.3.12.doc**

Dashes

**Balanchine—and His Cat 2.3.12.doc**

Apostrophes

**Balanchine’s Cat 2.3.12.doc**

Underscore

**Balanchine\_Cat 2.3.12.doc**

Ampersands (&)

**Balanchine & Cat 2.3.12.doc**

Dollar signs

**Balanchine & Cat Make the Big \$\$ 2.3.12.doc**

None of these symbols can be included in file names, however:

**\ / : “ ? “ < > |**

If it will help you remember it, feel free to call a file

**That # \$ @ % ! Form Letter I Keep Using.doc**

*The important thing is to call every file something that makes sense to you and that will still make sense when you come back to it.*

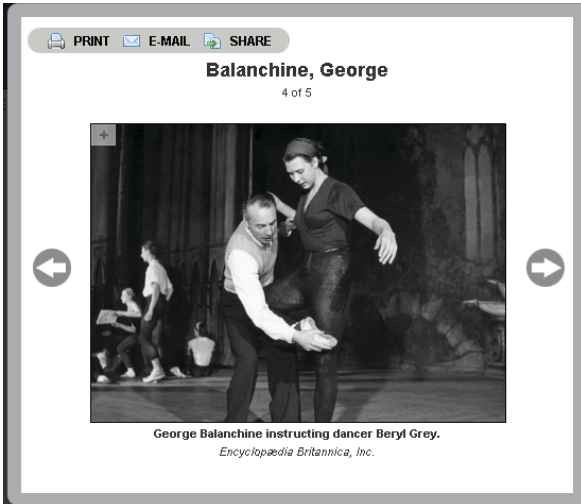
If you save images or HTML pages from the Internet, or if you cut and paste text from the Web into a document, don't fall into the trap of saving it under the provider's file name.

By default, this image from the *Encyclopedia Britannica* online would save as

**76298-004-FC18BB94.jpg**

A clearer name would be

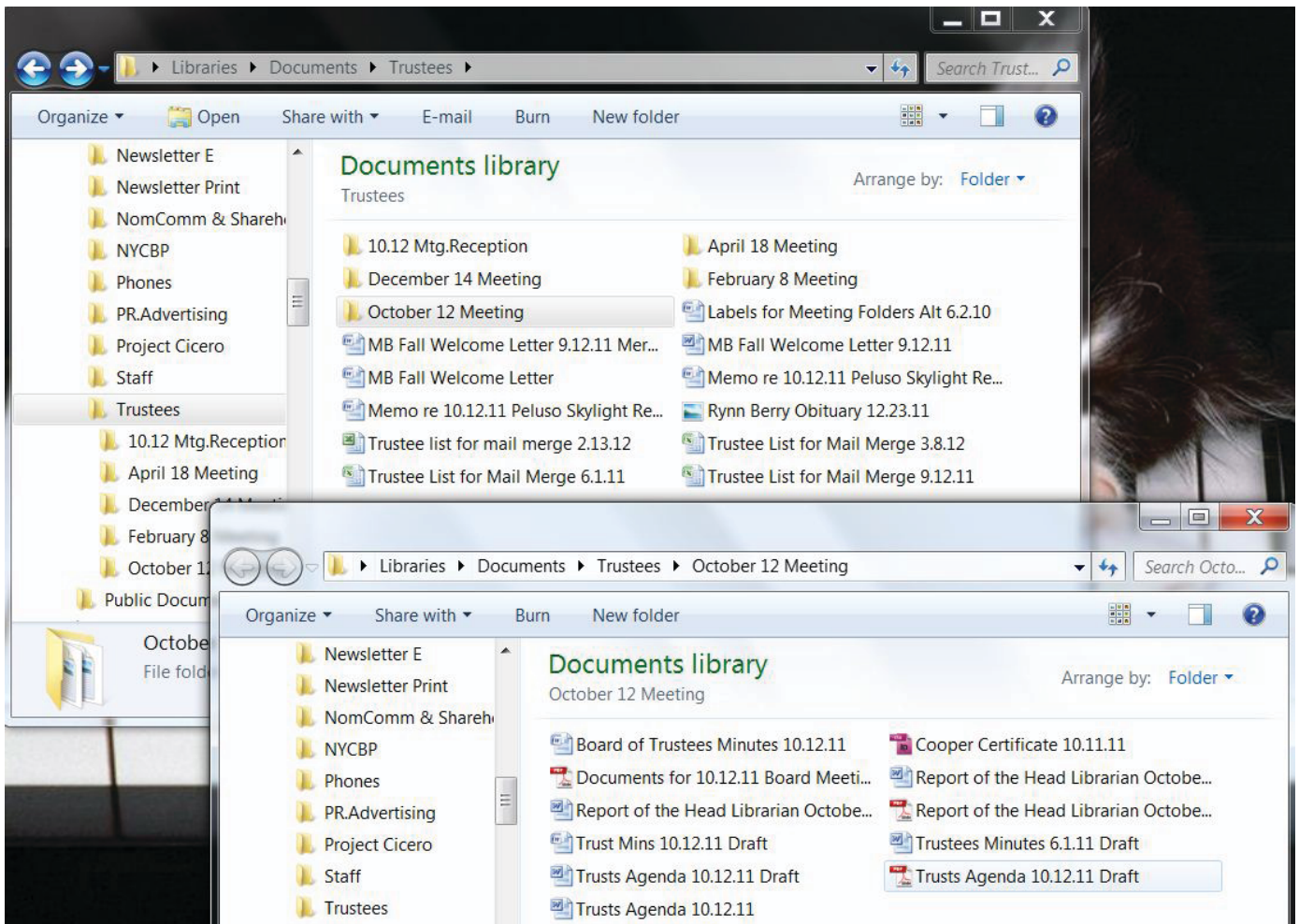
**Balanchine wBeryl Gray 4.9.12**



**Digital Organizing Top Tip #1:** Date EVERY SINGLE file you generate or save on your computer.

The format used above and in the folder at right below is one good option.

Use any date format you like as long as it does not contain a slash (\ or /).



## II. FOLDER SYSTEMS

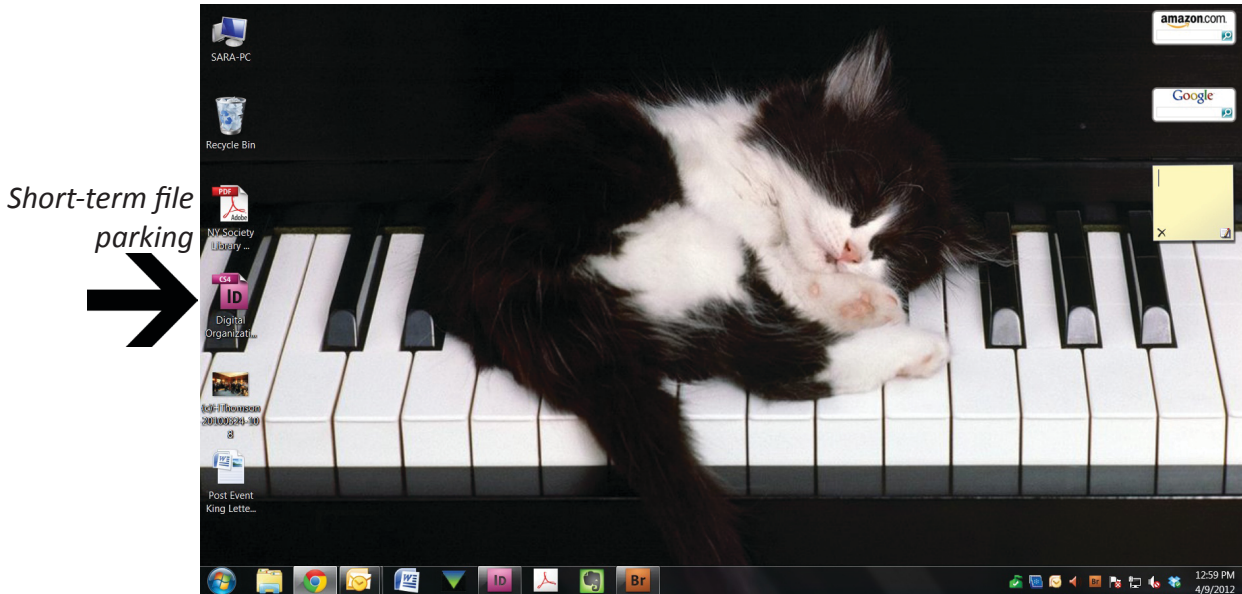
*The important thing is to distinguish between documents you need only for the next few minutes, documents you will be using on an ongoing basis, and documents you want to keep but do not need at hand.*

### 1) Very Temporary Files: Desktop

Good side: Always visible

Bad side: Can get messy easily

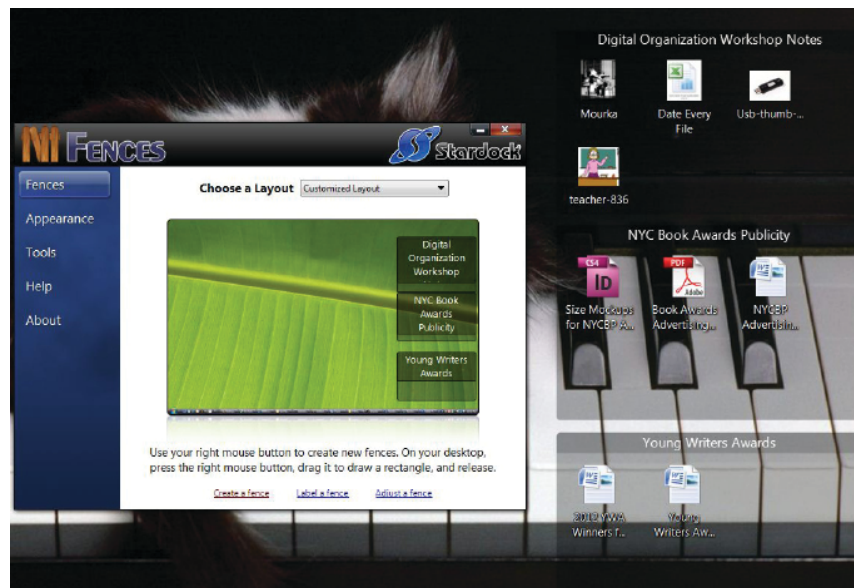
Use to temporarily store items you are sorting through or downloading—you can always call them simply [Subject] 1, [Subject] 2, and so on. When you have picked the ones you will keep and named them appropriately, put them elsewhere and delete the rest.



There's a good, lightweight program called Fences that will let you organize your desktop into subject areas. Download it free at

<http://www.stardock.com/products/fences/>

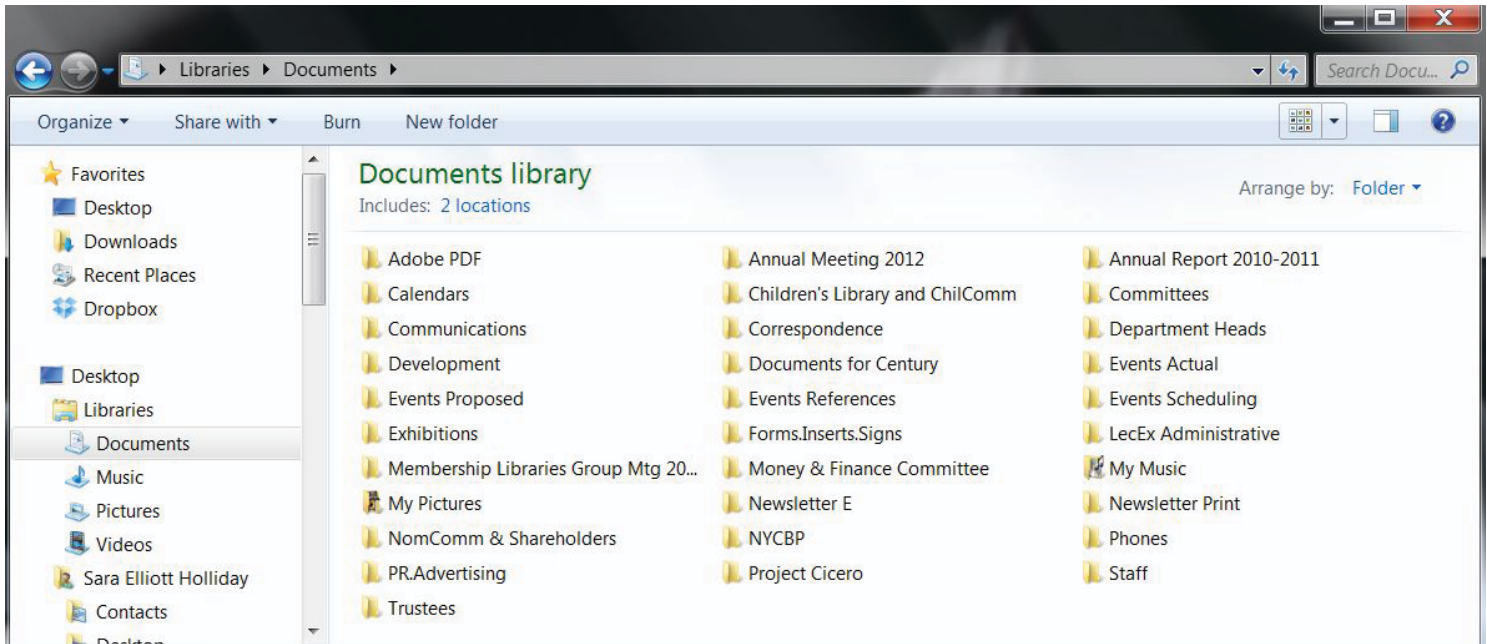
I still recommend using the desktop primarily for temporary storage, and using this level of organization as a first step toward “My Documents” folders. But if you don't need space for cute cat photos on your desktop, fence away.





## 2) Current Files: My Documents

This is the heart of your filing system. I find it most useful to organize its contents in sub-folders by subject. Create enough sub-folders to let you address just one subject or type of document at a time, but not so many that you're always hunting for files.



The same principle and practice hold for the number of levels 'down' you go within a folder.

**Documents library** (Level 1)  
Includes: 2 locations

- Adobe PDF
- Annual Report 2010-2011
- Children's Library and ChilComm
- Communications
- Department Heads
- Documents for Century** (Level 2, inside level 1)
- Events Proposed
- Events Scheduling
- Forms.Inserts.Signs
- Membership Libraries Group Mtg 20...
- My Music
- Newsletter E
- NomComm & Shareholders
- Phones
- Project Cicero

**Documents for Century** (Level 2, inside level 1)

- Annual Appeal Letters 9.1.11
- Business Cards 2.6.12
- Business Cards 9.13.11
- Business Cards for Blank Back
- NYSL Bartlett Notecard Revised 8.16.11 Folder
- NYSL Book Awards Invitation Folder
- NYSL Events Newsletter April-June 2012 Folder
- NYSL Events Newsletter November-December
- NYSL Events Sept-October 2011
- NYSL Features Newsletter Fall 2011 Reading O
- NYSL Features Newsletter Spring 2012 2.14.12
- NYSL Holiday Card 2011 11.16.11 Folder** (Level 3, inside level 2)
- NYSL Letterhead as of 9.21.11
- NYSL Letterhead for Annual Appeal 8.30.11 Folder

**NYSL Holiday Card 2011 11.16.11 Folder** (Level 3, inside level 2)

- Fonts
- Links
- Instructions
- NYSL Holiday Card 2011 11.16.11**
- NYSL Holiday Card 2011 11.16.11
- NYSL Holiday Card 2011 11.16.11

When you archive your computer, review your sub-folder system and make sure that every folder has something in it, but none have too many contradictory items, and revise as necessary.

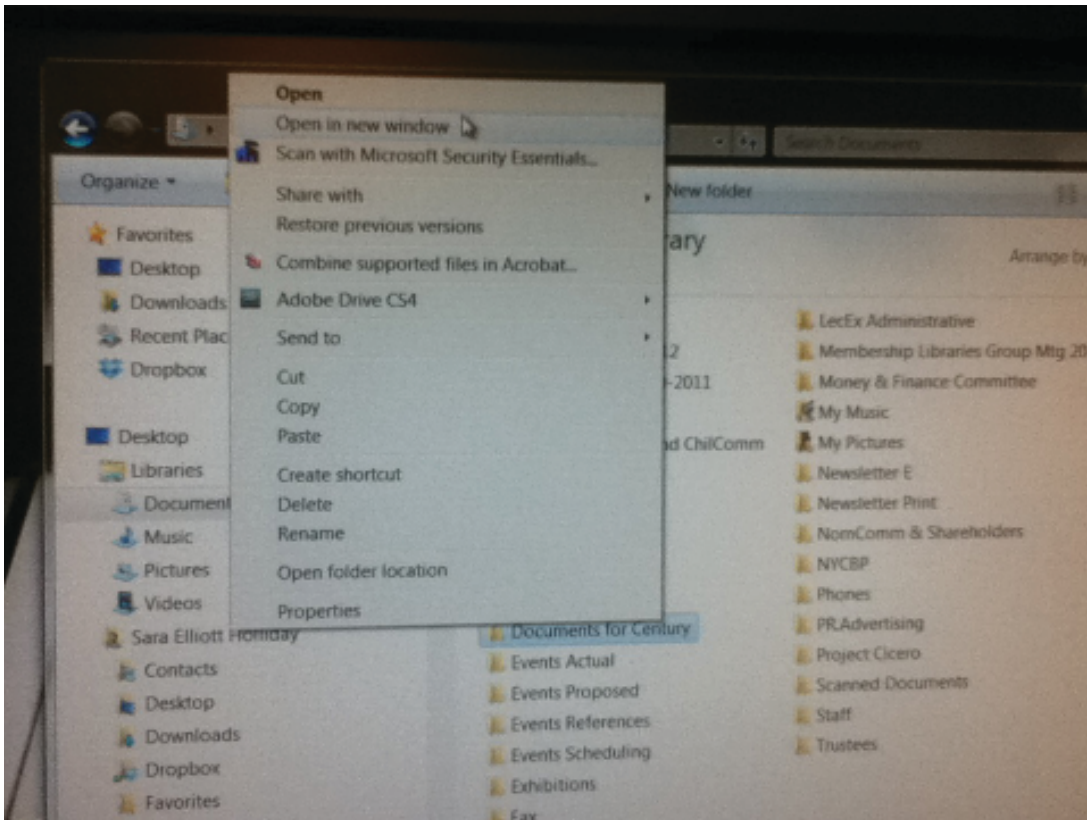
Other “My Documents” Details:

The “My Music” and “My Pictures” default folders within your My Documents cannot be deleted or re-named; better to adopt them and create sub-folders within them to match what you need to organize.

There’s no particular need to use the default folders called “My Downloads” or “Temp” anything.

Anytime you save new items to a folder, get a clear overview by right-clicking in any blank space in the folder and selecting “Arrange Icons By.” You can arrange the documents by name, date, or other qualities. This option is also available under the “View” menu.

To transfer items easily among folders, open a subfolder by right-clicking and selecting “Open in New Window.” Then you can align your folder windows side-by-side and rearrange at will.



**Digital Organizing Top Tip #2:** Use the word “Miscellaneous” sparingly if at all. A bumper crop of things called “miscellaneous” indicates that you need new category folders, and it will be hard to find things called miscellaneous in an archive.

If you’re not immediately sure where to file a document, give it a long descriptive name, save it in your My Documents outside the folders, and when it becomes clear, move it.



### 3) Past Files: Archive

Your archive is for files you want to keep but that you will not re-use on a daily or weekly basis.

You can make an initial archive on your hard drive (i.e., as a folder in your My Documents), but back it up frequently onto some other media.

**Digital Organizing Top Tip #3:** Back up your computer frequently--about once a month is good, or more if you generate a lot of content. Schedule this in Outlook or a web-based e-mail program, or write it on a printed calendar. Archiving will prevent you from losing needed documents and will help your computer run faster, when you delete extra copies of files.

#### Media Options for Backup/Archiving:

a) CDs. Good side: easy to separate files by subject matter.

Bad side: it takes a lot of CDs to hold a lot of material, and they take up physical space.

b) External hard drive.

Good side: works with any computer with a free USB port, and can be moved from computer to computer.

Bad side: higher initial cost; subject to the same possibility of crashing as any computer.



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[Black](#) [Silver](#) [Metallic blue](#) [Metallic red](#)

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c) Online services, such as [www.ibackup.com](http://www.ibackup.com). Some newer computers, including Dell's, offer built-in online backup that will run automatically as you schedule it to—[www.delldatasafe.com](http://www.delldatasafe.com).

Good side: no physical space taken up; materials are accessible from any computer with an Internet connection.

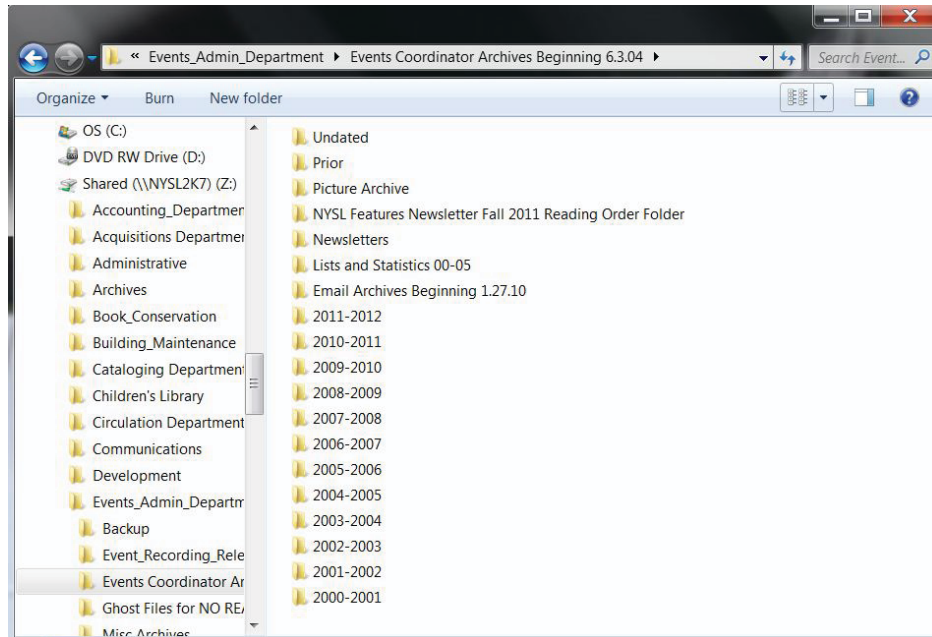
Bad side: a per-month cost.

#### Other Ways to Store and Move Files:

You may also want to explore portable and cloud media such as **flash drives** (aka thumb drives, data sticks) and **online locations** such as Dropbox ([www.dropbox.com](http://www.dropbox.com)) or Amazon.com's cloud drive. Each of these permits a generous amount of data upload for free, with the option to buy more space. These are best for temporary storage or items you need on more than one computer/device. For long-term maintenance of your files, try one of the options above.



When you archive, keep the folder names you had in your My Documents, but collect all those folders under a year indicator as well.



### Saving space with archived documents:

If you have folders containing multiple documents of 1 megabyte (MB) or more, like design files, videos, or high-resolution photos, you can compress files into ZIP form. These can easily be converted back into documents that can be modified. One useful program for ZIP conversion is WinZip, available for a reasonable price from

[www.winzip.com](http://www.winzip.com)

Given the ever-increasing space available on portable hard drives, however, this may not be necessary.



# III. REUSE AND RECYCLE

*My tenth-grade English teacher used to say, “Use your test to take your test.” One of the best side effects of organizing your digital files is being able to find old ones and reuse them as templates.*

**Digital Organizing Top Tip #4:** Use your test to take your test. Why reinvent the wheel when you can pirate one you invented last year?

Saving documents for reuse has an effect on where they are stored and in what form.

E.g., don't save something as a PDF and don't store it so far down in a sub-folder that it cannot easily be found.

To reuse a document:

1. Open the old document;
2. Save it *under a new name*;
3. Type over it and save the changes.

Or you can cut and paste into a new document if you want only text without formatting.


Then make sure there are no traces of the old or draft version in the final version, as in this note I received from a publicist:

The Jewish Social Studies Program and The department of Film and Media invite you to a lecture by

Calvin Trillin

“Midwestern Jews: Making Chopped Liver with Miracle Whip”  
Thursday, April 10, 2008, 6:00 P.M.

CALVIN TRILLIN has been a staff writer for *The New Yorker* since 1963. His most recent memoir was *About Alice*, a New York Times bestseller. His novels include *Tepper Isn't Going Out*, which he claims is “the first parking novel.” His columns for *The Nation*, newspaper syndication and *Time* have been collected in five books. He has published two books of satirical verse on the Bush administration, *Obliviously On He Sails* and *A Heckuva Job*. Born in Kansas City, he [add something JEWISH...]

 Yikes—ghost of a draft file!

For any document that will be extensively revised, or that is being created in collaboration, label the files [Name] Version 1, [Name] Version 2, and so on. Elements entering at any point can then be accessed. When the final form is reached, discard the old ones or archive them in a space-efficient form.

# IV. FINDING YOUR ORGANIZED FILES

*No matter how organized you are, you won't be able to lay your mouse on every file every time. And sometimes it's just easier to find a file using a search than to open all the sub-folders it's under.*

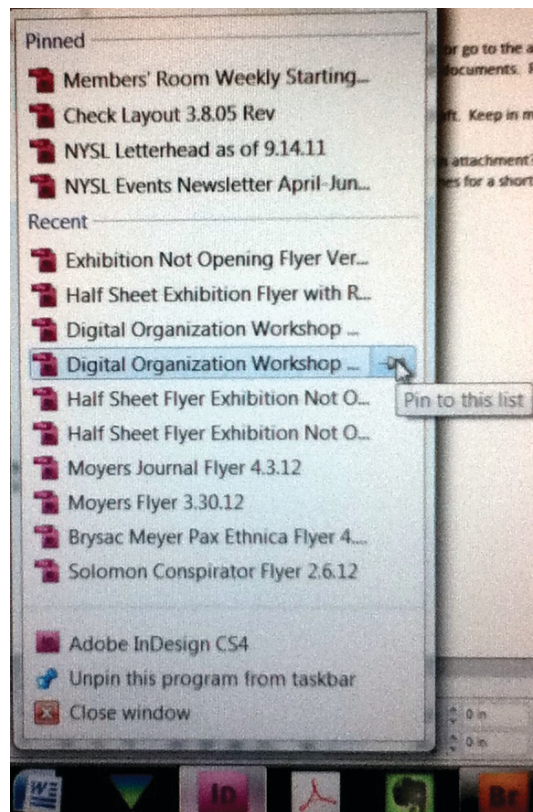
Easy access to items you use often:

'Pin' your most-used programs to the taskbar at the bottom of the screen.

1. Click on the Start button and scroll to the program icon of interest.
2. Right-click on it. A menu will pop up with the option "Pin to Taskbar." Click there.
3. The program will appear as a non-highlighted icon on the taskbar. It will be highlighted when it's open.

'Pin' your most-used or very current documents to their programs.

1. Open the document you want to pin, make sure it's saved where you want and under the exact name you want, and close it again.
2. If the program icon is in the taskbar, right-click on it. If it's in the Start menu, mouse to the arrow at its right. Either way, you should get a list of about ten recent documents.
3. Scroll to the one you want to pin, and click on the thumbtack image to its right.
4. It will now be at the top of the list whenever you right-click on the program icon. Remember, this is a shortcut, not a new location for the document.



Ways to retrieve a document that seems lost:

1. Right-click on a program icon on the taskbar, or go to the arrow to its right in the Start menu. This menu retains shortcuts to about ten recently used documents. Remember something soon enough, and it may be there.
2. The Recycle Bin, at least to find an earlier draft. Keep in mind that in Windows you must drag the icon from the Bin onto the desktop to open it.
3. Did you e-mail a document to someone as an attachment? It can be space-consuming to save a copy of all your sent e-mails, but retaining important ones for a short time can be very useful.

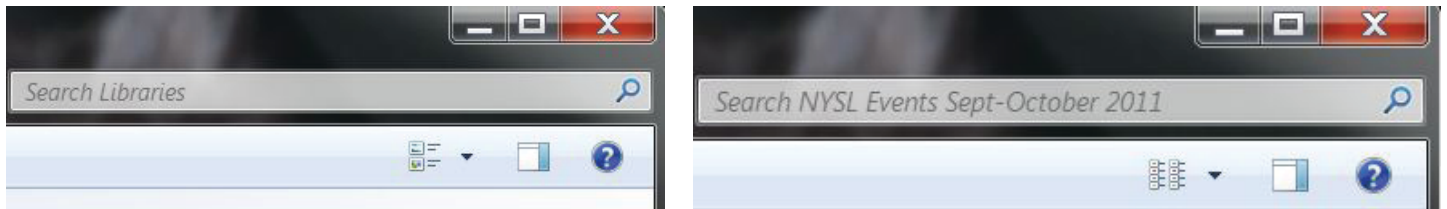
To search for a file on your computer:

If you haven't got a clue as to where it might be:

1. Click on the Start button.
2. In the box labeled "Search programs and files," type a search term. The key is to recall a unique word or combination of words that will be in this one file and not many others. The principle is the same as with an online search engine: one quickly learns never to search for "cat" if you're looking for Balanchine's dancing cat Mourka.

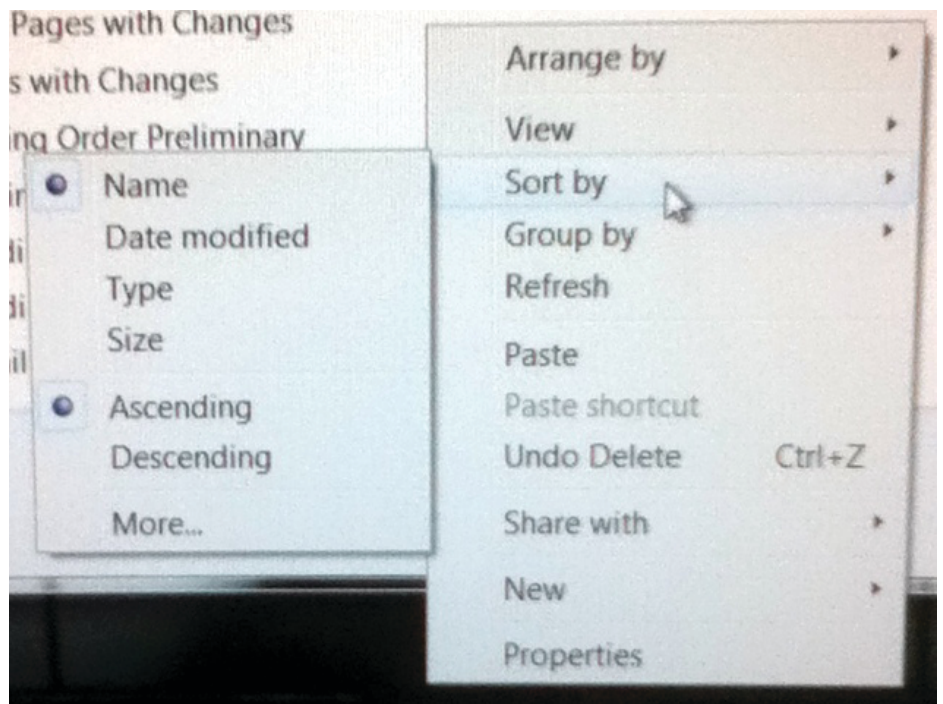
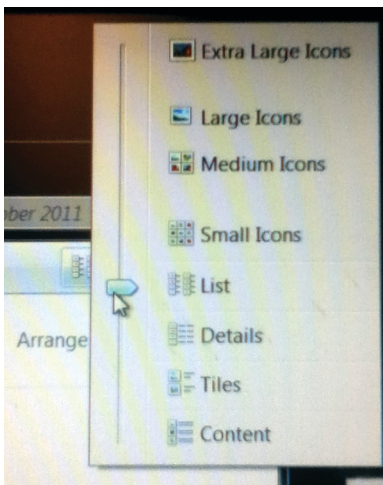
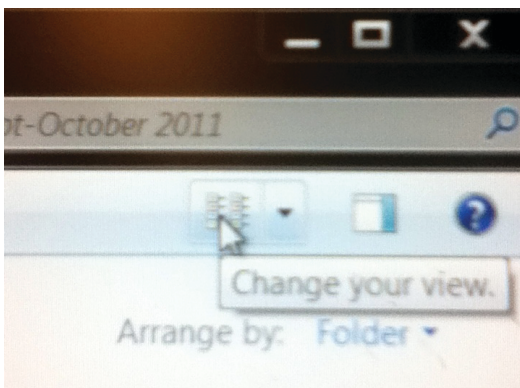
If you know generally what folder it's in but not the subfolder or the document's name:

1. Open your Windows Explorer folder (next to the Start button).
2. In the upper-right box labeled "Search Libraries," type your search term, OR go to as deep a subfolder as you remember, and search in the equivalent box.



If your search term is broad and returns too many results (or to view items in any window):

1. Use the third icon from the top right to change to "Small Icons" or "List" form to see as many results as possible on one screen. (*below left*)
2. Right-click in the box, select "Sort by" and choose either "Name," if the name is what will jog your memory, or "Date modified" to get the files in chronological order. "Type" is also a useful sorting device that will let you scan all the documents that are in Word or another program. (*below right*)





# V. PHOTO FOLDERS AND ALBUMS

*Lots of image-related programs want to be the iTunes of your photos. You don't have to let them.*

## Some Options for Organizing Photos

1. A program such as Google's Picasa, available free at

***<http://picasa.google.com/>***

Good side: offers great, easy-to-use tools for cropping, straightening, and fixing color and redeye in photos.

And did I mention free?

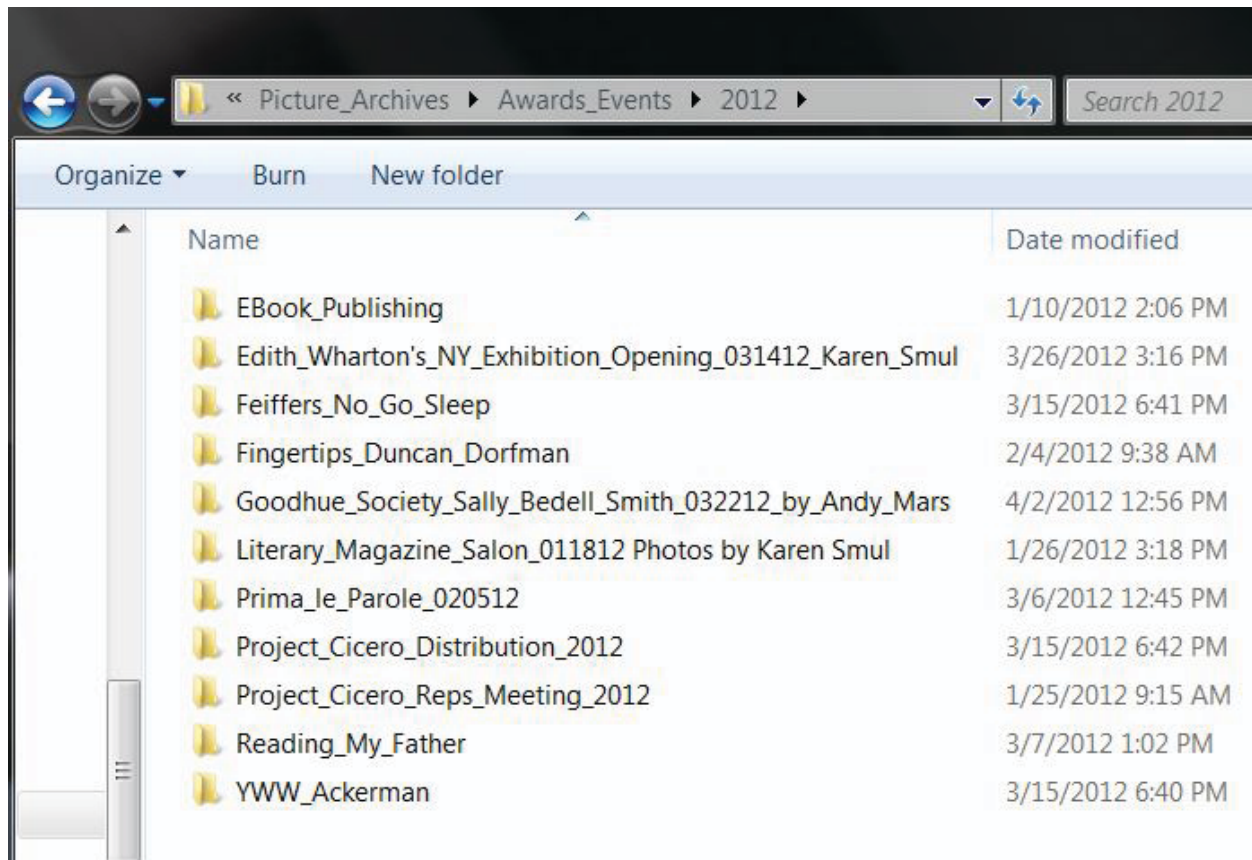
Bad side: will pull all the photos it finds into its own folder system and get confused if you move things around.

2. Treat photos just like any other file and put them in folders and subfolders, labeled with a relevant amount of information. The only difference is that while every Word document will need its own name (and date), you may want to leave individual photos with their default names and organize on the subfolder level.

Good side: keeps separate things separate; easy to find and label groups of pictures, and change the system whenever needed.

Bad side: harder to flip through all your folders like an album.

3. **Both** (recommended). Use Picasa or equivalent to edit and look through your photos, but use traditional folders to sort and store them.



# V. ORGANIZING EMAILS

*Or where to keep all those funny cat photos Aunt Joyce just sent you.*

## E-Mail Suggestions

Most e-mail programs will let you create subfolders in which to file read messages and even rules for filing new messages directly into them. See the help section or manual for your software or web-based e-mail for guidelines on this. In many web-based accounts, the first step is to click on “manage” or “manage folders.”

It may be most useful to have all new messages come into your Inbox, then for you to glance at them and slot them into the relevant folder for full consideration later on.

In naming folders, the principle is the same as in your My Documents: enough to separate different items, but not so many that you ever doubt where something should go.

In some e-mail programs, such as Microsoft Outlook, your sub-folders will be most easily viewed in the Folder List under the “View” menu. In that program, you can drag the right margin of your Folder List to make it fairly narrow and keep it open at the left side of your screen whenever you use the program, to keep track of what has gone where.

The guidelines for unique words and phrases go for searching for past e-mails as well. Another handy way to find a past message is to recall whether it had an attachment and look for the paperclip, or other attachment icon, at the left of a list of messages.

Below, folders and subfolders in Microsoft Outlook (*left*) and Gmail (*right*).

