week::one
File Management, Naming & Archiving

File Management Hints

Disk & File Organization

- o A simple, structured, and working disk organization is important because it's easy to lose track of files.
- o To avoid accidentally mixing up old and new files, test and experiments, **keep only one active copy of each layout file**, and store the others in a different folder.
  - ▪ If you do create more than one copy of a layout file, date the files so you can see which is most recent and move older ones into a folder named `Archives`.
- o Use **version numbers** (`MBI_Brochure_Layout_v1.indd`) and increment the number every time you start work on a file.
- o Save a PDF of each project with the working files.
- o Don't package files for output until they are completely finished.
  - ▪ In addition, consider Packaged files as *copies* and *disposable*.

Folder Management

- o Keep each job **completely in their own folder**.
  - ▪ Doing this sometimes requires multiple copies of art files. If you are creating two files with common art, it's best to keep the art in both folders, and give them different names.
- o Keeping jobs complete makes organization and retrieval of archives much easier.
- o Changes to one of the art files will not affect other documents. This can be good or bad.
  - ▪ A decrease in resolution to fit one application won't mess up a file used in other jobs. Be careful, though, to remember that multiple art files won't automatically be updated when you update one.
- o However, some files are best stored in a dedicated, stable location to be reused by many documents. Some examples are organizational logos, typefaces, and artwork that are used across many documents and must be the same in all occurrences.

Project Organization Example:

File Naming

- o When creating files, **use unique, meaningful names**. Obviously avoid the default `Untitled 1`, and not so obviously don't use names like `Retouched_photo` or `Color_corrected_Final`.
  - ▪ If you ever need a file from your archives, you probably won't find it with such a vague name.
- o Make sure you save files in the right place. Avoid using your Desktop as a temporary dump for all your files—you will end up with a mess.
  - ▪ …or if you do use the Desktop as a dumping ground, be sure to clean it up frequently.
- o Don't rely on the save dialog box to put you in the right folder. If you do loose a file, use Spotlight or your applications Recent Items… menu to locate it quickly.
  - ▪ However, do not rely on search too much — it's a helpful tool but not perfect.
- o On a Mac you can learn the location of an open document by **command-clicking** on the title in the title bar (the one with the close/minimize/MAXIMIZE buttons).
- o Be descriptive with your file names, but still be brief.
  - ▪ Both Windows and Mac OS X support up to 255 characters in file names.
- o Filenames don't need punctuation.
  - ▪ Avoid special characters in filenames, including: /\[]{};:'"<>,!@#$%^&*()
  - ▪ Use an underscore character (_) instead of a space.
  - ▪ Without punctuation names can look odd, but it's better than a file that won't transfer to a co-worker.
- o Always include the file extension when saving a file.
  - ▪ **.psd** for Photoshop
  - ▪ **.ai** for Illustrator
  - ▪ **.indd** for InDesign
  - ▪ **.eps** for Encapsulated PostScript
  - ▪ **.tif** or **.tiff** for TIFF images

Archiving Jobs & Backups

- o Make **PDFs** of every completed project.
- o Keep an **external drive dedicated to archive projects**.
  - ▪ Storage is cheap these days — there is no excuse for not having an extra drive for archiving.
- o For macOS, **Time Machine** in conjunction with a dedicated external hard drive works great for both archiving and general computer backup.
- o For the ultimate in backup, store a **second dedicated backup drive** at a different location than the primary external hard drive. Update this drive every six months or so.
- o When retrieving files from archives, it's a good idea to **rename** them, or at least add a number to the name. Otherwise, it is easy to end up with two different files on your archives that have exactly the same name.
- o Cloud storage services like **Dropbox** and **Google Drive** work well and now include some archive retrieval capabilities.
  - ▪ However, because they live-sync your work, they are not always the best for long-term archiving and backups.
  - ▪ It might be best to create an account with these services that is *only* for archiving.
- o There are a number of excellent, free cloning tools for macOS, including **SuperDuper!** and **CarbonCopyCloner**.
- o There are, however, **dedicated online backup services** like Carbonite. Using these might be a good solution, though personally I prefer having a physical backup copy by way of an external hard drive stored at a location other than my home.