PLANNING

Decide what belongs where

A simple map prevents one folder from becoming a dumping ground.

PERSONAL DIGITAL FILE ORGANIZER

CREATE TOP-LEVEL CATEGORIES

Choose a small set of categories that matches your life, such as Personal, Household, Work, Learning, Photos, and Archive. Keep temporary downloads separate from records you intend to retain.

- [ ] Use categories you can explain quickly
- [ ] Separate active work from completed material
- [ ] Create a private location for sensitive records

EXAMPLE

Example: Downloads is cleared weekly; ·Household / Home / 2026· holds active service and repair records.

PUT IT INTO PRACTICE

What categories reflect my real responsibilities?

Which folder currently mixes temporary and important files?

General digital-organization education only. Use secure, appropriate storage for sensitive records and follow service terms, workplace rules, and applicable privacy requirements.

PLANNING

Use names that sort well

A consistent filename works without opening the file.

PERSONAL DIGITAL FILE ORGANIZER

CHOOSE A NAMING PATTERN

Use a date first when chronology matters, then a plain-language subject and version if needed. Avoid vague names such as ·final· or ·new· that lose meaning over time.

- [ ] Pattern: YYYY-MM-DD_subject_version
- [ ] Use words you will search later
- [ ] Keep extensions visible; do not rely on icons alone

EXAMPLE

Example: ·2026-05-14_lease-renewal_signed.pdf· is clearer than ·lease final final.pdf.·

PUT IT INTO PRACTICE

What filename pattern will I use this week?

Which important file needs a clearer name?

PLANNING

Triage the existing pile

Sort in short sessions so progress remains manageable.

PERSONAL DIGITAL FILE ORGANIZER

USE FOUR DECISIONS

Work from one location at a time and decide Keep, Move, Archive, or Delete. Do not open every file unless the name or date makes its purpose unclear.

- [ ] Start with desktop or downloads, not every drive
- [ ] Delete duplicates only after confirming the retained copy
- [ ] Put unresolved items in a dated review folder

EXAMPLE

Example: In 20 minutes, Lee moves current projects, archives completed scans, deletes installer files, and flags three unnamed PDFs for review.

PUT IT INTO PRACTICE

Which one location will I process first?

What can I decide without opening every file?

PLANNING

Protect sensitive records

Convenience should not expose private information.

PERSONAL DIGITAL FILE ORGANIZER

LIMIT ACCESS DELIBERATELY

Identify files containing identifiers, health, financial, legal, or family information. Store them in accounts with strong unique passwords and multi-factor authentication, and avoid casual sharing links.

- [ ] Review who can access shared folders
- [ ] Use encryption or protected storage where appropriate
- [ ] Remove old devices and collaborators

EXAMPLE

Example: Morgan moves identity documents out of a broad family share into a restricted folder and checks access permissions.

PUT IT INTO PRACTICE

Which folder contains sensitive records?

Who should no longer have access?

PLANNING

Back up what matters

A sync service is useful, but it is not the only recovery plan.

PERSONAL DIGITAL FILE ORGANIZER

CREATE A BACKUP ROUTINE

Keep another recoverable copy of irreplaceable files, such as photos and records, in a separate location or service. Test restoring a non-sensitive file so you know the process works.

- [ ] Choose what is essential to back up first
- [ ] Protect backup accounts with strong sign-in
- [ ] Set a recurring reminder to check completion

EXAMPLE

Example: Every first Sunday, Ana confirms that photos and documents copied to her backup location and restores one test file.

PUT IT INTO PRACTICE

What files would be hardest to replace?

When will I test a restore?

PLANNING

Make search easier

Metadata and small habits reduce future hunting.

PERSONAL DIGITAL FILE ORGANIZER

ADD USEFUL CONTEXT

Use folder placement, descriptive titles, tags, and brief notes consistently. Keep a simple index only for records that are hard to locate or have recurring deadlines.

- [ ] Use one source of truth for active files
- [ ] Link related files rather than duplicating them
- [ ] Record location and renewal date for key documents

EXAMPLE

Example: A home warranty PDF is stored under Household / Home and listed in an index with its expiration date.

PUT IT INTO PRACTICE

Which record needs an index entry?

Where is the single source of truth for this project?

PLANNING

Schedule maintenance

Organization lasts when review is part of the system.

PERSONAL DIGITAL FILE ORGANIZER

CLOSE WITH A MONTHLY RESET

Set a brief monthly appointment to clear downloads, rename new records, review sharing, and check backups. Archive completed projects on a regular schedule instead of waiting for a crisis.

- [ ] Ten minutes for downloads and desktop
- [ ] Review one active category each month
- [ ] Write one improvement after every reset

EXAMPLE

Example: On the first Friday, Devon processes downloads, removes one stale share link, and archives the finished volunteer project.

PUT IT INTO PRACTICE

What is my monthly reset date?

What single rule will make the system easier to keep?