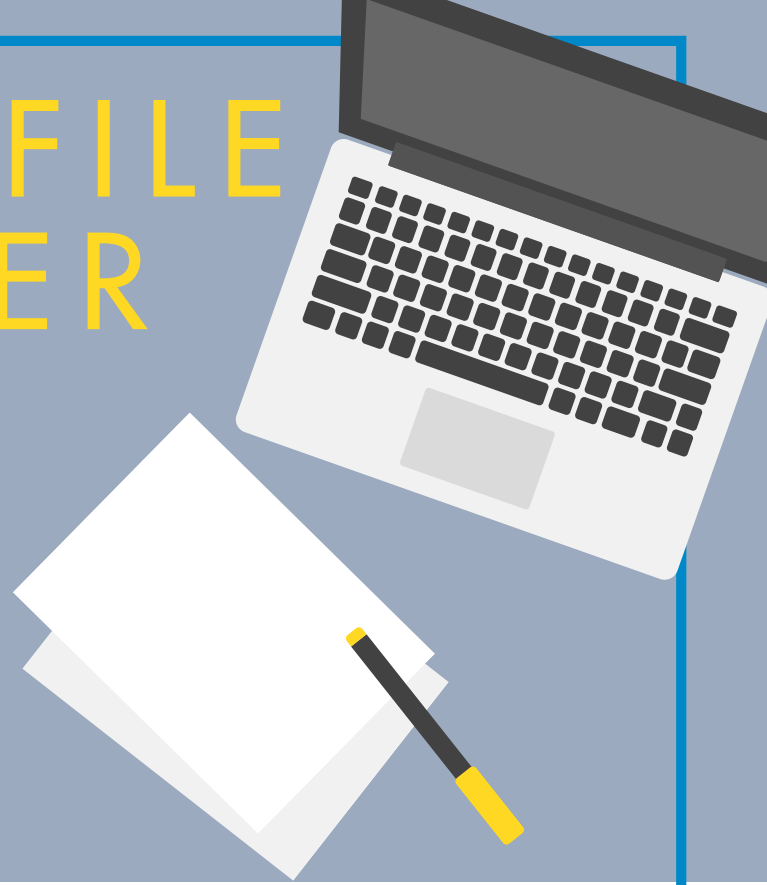
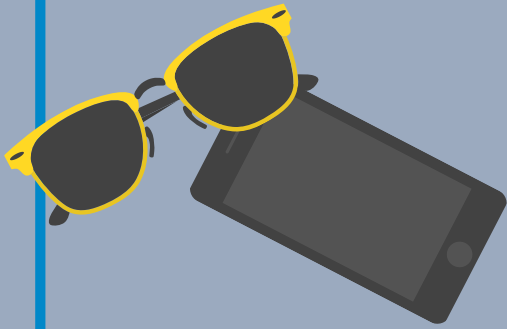


DIGITAL FILE DECLUTTER

Worksheet and Checklist



Has your desktop become a file dumping ground?

Digital stuff can build up just like real stuff and create clutter. While it may be easier to ignore than clutter that you have to push aside or walk over, like tangible clutter it has negative consequences on your ability to find what you need when you need it and get things done.

The Simply Placed Organizational experts are here to help!

This guide walks you step-by-step through assessing your existing digital clutter, determining your plan of attack, and providing a path to stay on the organization straight and narrow.

Let's get down to decluttering!



DO A DIGITAL FILE DEEP DIVE

ON A PC



LAUNCH FILE EXPLORER (WINDOWS 10)

ON A MAC



LAUNCHFINDER (IOS)



1. SEARCH BY DOCUMENT OR FOLDER TYPE

Using your search bar begin assessing the types of files that you currently have by searching .pdf, .xls, docx, .mp3, or any other common file type you use.



2. SEARCH FOR DOCUMENTS BY NAME OR KEYWORD

If you have used good naming conventions in the past this will help pull files that are related to one another. If you don't have a system yet, **don't worry**, we will cover how to choose one!

NOW LET'S SORT USING A FEW OTHER VARIABLES!



3. SORT YOUR DOCUMENTS AND FOLDERS BY DATE

You can quickly arrange by date (ascending or descending) by clicking on the column header Date Modified. Take a good look at your oldest items. Start thinking about the amount of time to retain items.



4. SORT YOUR DOCUMENTS AND FOLDERS BY SIZE

Sort by size by clicking on the column header Size. Take a good look at your largest sized files or folders containing large amounts of data.



ASSESS BEFORE YOU DELETE

Use the questions below to help you shape your plan to get organized! This will give you a strong idea of the areas to focus on and clean up, as well as a strong foundation moving forward.

DO YOU HAVE YOUR DATA BACKED UP? YES NO

IF NO, STOP AND DETERMINE YOUR DATA BACK UP SOLUTION MOVING FORWARD:

TIP

A backup stores your data so you can get back up and running with minimal loss after a hard drive loss or failure. You can backup manually to an external hard drive or to the cloud. You can also set up cloud-based services to automatically and regularly backup your data.

DO YOU NEED AND USE ALL OF YOUR DATA? YES NO

IF NO, WHAT WILL YOU PLAN TO GET RID OF?

ASSESS BEFORE YOU DELETE CONT.

DO YOU HAVE AN ARCHIVE AND DESTRUCTION POLICY?

YES NO

IF NO, DETERMINE WHAT THEY WILL BE MOVING FORWARD:

TIP

An archive allows you to keep older files without taking up space on your active hard drive. A destruction policy clarifies how long you plan to keep files and facilitates purging of irrelevant data.

DO YOU HAVE MULTIPLE VERSIONS OF THE SAME DOCUMENT?

YES NO

DETERMINE WHAT TO KEEP AND HOW TO GROUP THEM TOGETHER:

TIP

Group like items together either by file type, project, person or by year.

DO YOUR FILE FOLDER AND DOCUMENT NAMES MAKE SENSE?

YES NO

WHAT IS YOUR FILING NAMING STRUCTURE MOVING FORWARD?

TIP

Ideal naming conventions include a date and description. Get consistent file naming conventions from the Dealing with Digital Disorder Guide.

ASSESS BEFORE YOU DELETE CONT.

DOES YOUR FILING STRUCTURE MAKE SENSE? YES NO

WHAT IS YOUR FILE ORGANIZATIONAL STRUCTURE MOVING FORWARD?

TIP

A strong filing structure that sorts documents by type, project, person or date can facilitate a visual search. Get examples solutions in the Dealing with Digital Disorder Guide.

ARE YOU USING YOUR EMAIL INBOX AS DATA STORAGE OR AS A TO-DO LIST? YES NO

WHAT IS YOUR EMAIL ORGANIZATION SOLUTION MOVING FORWARD?

TIP

Process email using the Make 1 of 5 Decisions system. Get strategies to declutter your inbox easily at itssimplyplaced.com/how-to-create-email-white-space.

Get Decluttering!

Now that you have a plan in place, you can begin your decluttering project. Use the structures and policies you've determined for yourself moving forward and begin to assess your files at the end of a project or within a specified period of time. We have provided a schedule checklist on the next page!



FILE ASSESSMENT CHECKLIST

WWW.ITSSIMPLYPLACED.COM

1ST QUARTER

FILE DECLUTTER DATE: / /

- FILES BACKED UP
- FILES AND EMAILS ARCHIVED/DELETED
- NAMING/FILE STRUCTURE TIDIED

2ND QUARTER

FILE DECLUTTER DATE: / /

- FILES BACKED UP
- FILES AND EMAILS ARCHIVED/DELETED
- NAMING/FILE STRUCTURE TIDIED

3RD QUARTER

FILE DECLUTTER DATE: / /

- FILES BACKED UP
- FILES AND EMAILS ARCHIVED/DELETED
- NAMING/FILE STRUCTURE TIDIED

4TH QUARTER

FILE DECLUTTER DATE: / /

- FILES BACKED UP
- FILES AND EMAILS ARCHIVED/DELETED
- NAMING/FILE STRUCTURE TIDIED