ARE YOUR FILES REALLY SAFE?

By Carolyn H. Brown

I have been a member of Eastman's Online Genealogy Newsletter <www.eogn.com> for many years, and Dick always reminds us at the end of the month to backup our data, and I totally concur. However, we need to think about WHAT, WHEN, WHERE and HOW to accomplish the task.

WHAT SHOULD AND SHOULDN'T WE BACKUP?

It is important to backup all files including data and graphics which has been personally created, received via email or as text, or downloaded from the Internet. Basically anything which isn't a program that came on an install CD, DVD or flash drive, which is needed to install those programs on another computer. If it is a program downloaded from the internet, only the original downloaded file needs to be backed up.

Unfortunately, any program which came on the computer when purchased can not be transferred to a new computer, even when the new computer and the old one are from the same company. When migrating to a new computer you will need to purchase the latest version of those programs you can't move.

In most cases, backing up the entire hard drive is not recommended. More often than not the new computer will come with a more up-to-date operating system, and many of the programs may not run on it.

WHEN TO BACKUP FILES?

The general consensus of opinion is to backup file at least once a month. It helps to do it on a set day, like first of month. It is easy to remember and, once in the habit, it is easy to continue. At a bare minimum every six (6) months. The more often the better. If you have an external hard drive, set it to backup at least once a day or more.

Backing up everything every six months and then only new or modified files every month, will insure you have the most current set of files to restore.

WHERE TO BACKUP FILES?

It helps to follow the backup 3-2-1 principle.

Save to **three (3) unique file backup locations** so there are three distinct copies of each file.

Save to **two (2) different storage media**. Don't put all of your digital files in one basket. Having two copies of the same file on one computer does not save the file if the hard drive dies. Store a separate copy to an external hard drive.

Save to **one (1) off-site storage**. To protect the data from a natural disaster, one copy must be stored some place else. That place should be away from the computer and the building it is in, or in the cloud. One way is to save the files to a flash drive or DVD, and give it to a family member or friend.

The use of the cloud for storage should be considered as a temporary storage location, since any company can change their cloud storage options without notice. Some of us were caught by the decision Ancestry made to stop Y-DNA and mtDNA testing and the data they stored is no longer available to those of us who had our DNA tested with Ancestry. Another problem occurred when Google Drive cut the size of their free storage from 15 to 5 GB's. Any of these companies can go out of business or change their rules at anytime. Therefore, some other type of offsite storage is recommended. Also the cloud storage companies have terms and conditions you should read before using their service. Make sure you read the fine print as they may have you agree that they can use your information and share it with others without further permission from you. When using these sites, use file encryption for all sensitive data.

HOW TO SAVE AND BACKUP FILES?
To make the backup process easier it helps if all files you create, no matter what program was used to create them, are saved to an appropriately named folder under DOCUMENTS. That way, the files will always be easy to find, and they won't be missed during the backup process. When you save the files to DOCUMENTS, DOWNLOADS, PICTURES, MUSIC, VIDEOS and SCANS folders, they are the only folders which must be backed up.

File formats – Save your more important files in multiple formats.

Text files should be saved in two or three formats. The first format is the one used by the program which created them. . . such as .DOC and .DOCX format for Word files. They should then be saved in a format which any document type program can open . . . like .RTF format. Understand that with .RTF formatted file some information and formatting may be lost when the file is opened in another program. To save all of the formatting features so you can see what the original file looked like use .PDF format.

Graphic and photo files should be save in the original format, and immediately save to .TIF format. TIF is a lose-less format. Saving the file to .TIF allows the file to be modified and re-saved without changing the integrity of the original. When a file is saved in .JPG file (a lossy format) it loses some of the pixels and will become distorted if saved multiple times.

Genealogy program files should be saved in the original program format, and exported to a GEDCOM format. Opening a GEDCOM file in a genealogy program other than one from which it was created may cause some of the data to be lost. The media files may not transfer and the user will have to re-link the original files to the new program. Therefore, make sure that the media file folder is stored with the genealogy program file folder. Also, when creating a backup of the genealogy file, make sure you not only save a .ZIP file, but also save a copy of the file in it's original format to a new name and date it. Once you do that, you may choose to use the file you were working in, or the new file for future entries.

E-mails – Genealogists send and receive lots of e-mails. Many of them contain information, documents or photos about our families which need to be saved. If an e-mail has an attachment (even if it is a photo), save it to a folder for that family under DOCUMENTS. For the text in the e-mail, open the e-mail with the FORWARD option. Then copy everything, including the header information, and paste it in a document. Save the file to the family folder to which it applies. Indicate in the document file if there were attachments, what they were and where they have been saved.

Text Messages – It is so easy to text family members now rather than calling, that we all receive important information via text on our smart phones. The easiest way to get the text from your phone message area to your computer is to send it to your e-mail address, and open the e-mail on your computer to save it. To do this click on the text or photo you want to save within the message. A box comes up for COPY or MORE. Click on MORE and at the bottom right of the screen click in the ARROW. The new MASSAGE BAR will appear. Enter your e-mail address. And send the message. If the message has multiple parts you want to save, you will need to repeat the process for each section. The parts can be combined when they are saved to a document file as explained above.

Some programs, such as Quicken, do not save the file in a backup format unless you tell it to. Therefore, if you lose the file, you must have a backup to restore from. It is important to know the backup features of all programs you use.

BACKING UP FILES
Microsoft and Apple provide backup programs, however, once the files are backed up it may be difficult to get to the one file you want to recover. They are great for backing up everything on your computer, but not so great for individual files, therefore, it is recommended that a simple copy of the files will be easier to use should something go wrong. It may be hard to deal with a backup file, when you don't want to restore everything to the new computer, or to the computer you are using.

To save the files to a backup hard drive or cloud storage, open the storage device and create a new folder with the date of the backup as part of the name. Open the folder just created and use the drag-drop method or copy-paste method to get the files to the new location. After you have several back up folders for the same data on the selected media, delete some of the older folders.

WHAT TO DO WITH PAPER FILES AFTER DIGITAL BACKUP?
We all struggle with the questions of what to do with the paper files after the digital files have been created and safely backed up. When we think about it, the answer is to preserve the original documents in archival sheet protectors, and keep then in binders where they can easily be located by your family. This goes for both documents and photographs.

When you think about what you have on your computer and the backup devices you have used, you will soon realize yoru family members can't easily see what you have digitized. Someone would have to go through each file on your computer or device to see what to keep and what to throw away. When the family is thumbing through paper files which are well maintained, there is a better chance that your hard work will live on after you are gone.

To ensure your original paper documents are kept, create a well labeled binder for each surname in your research, and put your original documents in sheet protectors so they can be viewed. In the binder make note of the location of the files on your computer so your family knows what to keep. Keeping them in folders in a drawer may have them so well hidden that no one wants to deal with them.