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TAKE CONTROL OF

MANAGING YOUR FILES

COVERS
macOS • iOS • iPadOS

by **JEFF CARLSON**

\$12.99

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Read Me First

Welcome to *Take Control of Managing Your Files*, version 1.0, published in December 2020 by alt concepts inc. This book was written by Jeff Carlson and edited by Joe Kissell.

This book helps you take on the daunting task of organizing digital files and folders on your devices and teaches you how to effectively organize, locate, and clean up the clutter.

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Basics

Managing digital files is a task on any system, but for this book I'm focusing on working with Apple's Mac, iPhone, iPad, and iPod touch products. More specifically, the material covers working in macOS 11 Big Sur, iOS 14, and iPad OS 14, though the features I describe are present in recent versions of the operating systems. Big Sur in particular has a new look and feel from earlier macOS releases, which you'll notice in the screenshots, but the functionality is similar. I'll point out differences as they come up.

Understand Paths

Also, this book frequently uses path nomenclature to indicate folder locations. If you're unfamiliar with this style, it compactly describes the hierarchy of folders starting at the base (sometimes called the "root") level of the computer system, with folders and subfolders added as you read from left to right. The computer's internal SSD or hard disk is named `Macintosh HD` by default (although that can be changed). One important folder at the top level is `Users`, and inside that is the *home folder* (bearing your short username) that contains data specific to your user account on the computer. In path form, that structure looks like this:

```
Macintosh HD/Users/your-username
```

In macOS, you access files and folders in an application called the Finder. Most of the files you work with are stored in your home folder; the first two levels (`Macintosh HD` and `Macintosh HD/Users`) contain system files and other folders that you rarely need to worry about, so we generally don't mention them. If a path begins with a tilde (`~`) character, it means the first folder is in your home folder, like so: `~/Documents`. To open that folder in the Finder, you'd choose `Go > Home`, and then open the Documents folder. That's the same location as:

```
Macintosh HD/Users/your-username/Documents
```

To put this into practice: A file that is stored in `~/Documents/Finances/Taxes` translates to “open the Documents folder in your home folder, and then open the Finances folder inside it, and then open the Taxes folder inside the Finances folder.”

View Filename Extensions

In Apple’s quest to make computers more approachable, filename extensions are (understandably) hidden by default. You may see a text file named `Important`, but the actual filename is `Important.txt`. That filename extension is important to macOS, because it identifies the type of file and which app should open it.

In this book, we’re going to cover some situations where it’s helpful to see the extension, such as when searching for files. So, I recommend you make them visible: choose Finder > Preferences, click the Advanced button, and select “Show all filename extensions.”

Introduction

This book is an acknowledgment of failure.

Not *your* failure—the failure of our computer systems. I’ve long believed that computers are supposed to make tasks easier, but when it comes to dealing with files, we spend a lot of time and energy simply wrangling documents and folders. Why should we get bogged down in managing them, when there are so many more interesting things we can do?

We don’t have to carry on in the same manual-management way. Strategies exist for getting a handle on it all, including taking advantage of features in macOS, iOS, and iPadOS that can make file management easier. Good organization is also about identifying which approaches work best for you, and prioritizing your needs as well as your data.

In this vein, it’s important to keep in mind that we’re all different. Some people don’t want to deal with files at all. Some develop extensive folder hierarchies. Some are fine with what Apple provides, but don’t know what the operating systems are capable of. It’s impossible to hit every possibility in one book, but I’ll do my best to present you with options as appropriate.

Quick Start to Managing Your Files

I've structured this book in a top-down manner, the way you'd approach a digital map in the Maps app. It starts up high, looking at general concepts and asking you to consider your goals. From there it zooms in to more specific topics and tasks, from examining organizational strategies to searching for files and cleaning up clutter.

Set goals and strategies:

- Before we click or touch a single file, it's important to [Answer Key Questions](#) about the scope of the task and also about your own preferences so you can [Set Goals](#) effectively to managing your files.
- With that knowledge, [Develop Strategies that Work for You](#) to help you wrangle files, from building consistent folder hierarchies to applying tags. Also, learn the implications of syncing files among devices and how to choose between external and internal storage.

Start organizing:

- It's time to get practical, starting with efficiency. [Create Priority Shortcuts](#) to access your most important files and folders quickly.
- Just as you navigate your home using a mental model of its floor plan, you need to [Understand the Layout](#) of where macOS, iOS, and iPadOS store files. In macOS especially, [Understand the Desktop](#) and the role it plays in syncing with iCloud Drive.
- Learn how to [Organize Using Files and Folders](#) and also how to [Organize Using Tags](#) so you can incorporate those actions into your file management strategy.
- If you think this means you'll be spending all your time pushing files around, think again. When you know how to [Automate File Organization](#), you'll save time and remove stress while meeting your goals.

Search for anything

- The work you put into organizing your files pays off when you [Find Files in macOS](#) using Spotlight searches, smart folders with multiple criteria, and third-party search apps.
- Spotlight isn't as robust on Apple's mobile devices, but you'll discover it's more capable than it first appears when you [Find Files in iOS and iPadOS](#).

Cut the clutter

- Organizing is largely about how to deal with incoming files, but the lessons you learned can be applied to what's already on your computer. [Set a Cleaning Strategy](#) for tackling the task of dealing with old files and eliminating duplicates.
- Learn how to [Free Up Storage Space](#), the natural byproduct of having an organized system for managing your files.

Set File Management Goals

The practical, orderly side of me wants to get straight to the step-by-step details of managing files. But first, let's talk about *you*.

Why invest your time managing digital files when it would be easier to just toss everything onto the desktop, or leave things where they are already? I see three possibilities:

- You want quick access to important files, such as those for projects you're actively working on.
- You want to be able to find anything on your computer or mobile device without hunting and pecking through folder hierarchies to do it. Or, perhaps you need to make sure someone else can access your files easily.
- You want to reduce clutter, archive old files, and ease any mental anxiety that comes from working in a messy environment. You may feel as if your files have gotten out of hand, or you've put off organizing them for too long. Alternately, you may not *want* to do any of this, but you realize you *need* to do it.

If you're like me, your reaction is: "Yes, I want all of that, please! Preferably as soon as possible."

To get there, I'm going to repeatedly come back to the concept of *priority*.

We tend to think of files and folders as items that must be placed in some orderly fashion on our computers. But that's just *storage*. As soon as we get involved in doing something with those files, we introduce two other factors that direct how we interact and manage the files: *timeliness* and *intent*.

Think about how things are stored in the physical world. For example, consider something as mundane as hand towels for use in a bathroom.

One option is to store the towels in a box at the back of a closet or storage room in your house. It's an efficient choice: many towels fit into a box, and the towels aren't getting in the way as they would if they were strewn about haphazardly. However, this approach isn't convenient, because when your hands are dripping wet, it's difficult to easily get to the towels.

A more sensible option is to hang one or two towels on a rack within reach of the bathroom sink, so you can grab them quickly to dry your hands. The remaining towels go into a cupboard or basket in the bathroom to replace the towels that get too wet or dirty. You could still pack some towels in that box in the storage room if you need extras when guests visit.

Both approaches work for storing the hand towels, but the second option is the most timely, and it demonstrates your intent to make the towels available where they're most useful.

Back to your computer. The files there are just bits of data that can be stored anywhere. It's what you plan to do with them, and when, that establishes their priority and helps direct you to file management strategies that work for you.

Answer Key Questions

Our next task is to answer three key questions. These will help define what sort of work needs to be done, whether we're talking about one device or several, and how your current management mindset can be applied to your digital files. After that, we'll set more specific goals and point to strategies and actions to meet those goals.

Develop Strategies that Work for You

With file management goals in mind, we can build strategies for reaching them. In this chapter, we're going to tackle high-level file management before moving into the specifics of organizing in the next chapter. That includes an overview of approaches such as grouping files and folders, applying Finder tags, and using search features.

We're also covering two other important considerations: syncing files among multiple devices and computers, and choosing which files to store on your computer's internal storage versus external storage such as a hard drive or NAS (network attached storage) device. Plus, no book about files is complete without mentioning backups!

Consider File Management Strategies

I'm breaking out the following strategies as separate approaches, but in reality you'll likely end up using aspects of each as you determine what's most effective for you.

Group Files by Project or Topic

This management system uses the hierarchical folder structure of the Finder to organize your files by project, topic, or other criteria. macOS does some of this for you already, providing folders such as Documents and Pictures (see [Understand the Layout](#)), but you can implement your own structure if you choose.

For example, on my computer, I keep nearly all of my business files in a folder called Never Enough Coffee (the name of my company). When I start a new project or gain a new client, I create a new folder inside that folder.

The way you name and organize these nests of folders depends on how your projects are set up. In my case, when I write an article for an outlet such as DPReview, I make a new folder inside the client's folder, creating a directory like this: [Never Enough Coffee/DPReview/Affinity Photo for iPad](#) (**Figure 1**).

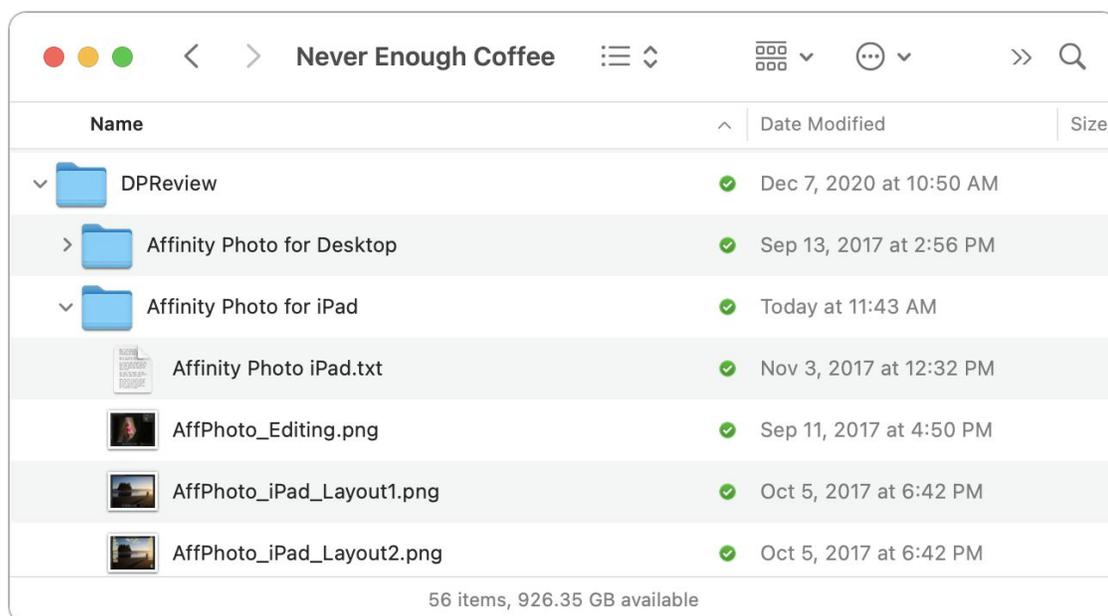


Figure 1: This hierarchical nest of folders leads me quickly to a project I worked on.

The key to this strategy is consistency. You're able to traverse folders logically without pausing to remember where you may have saved something at one point. For instance, if you need to find a tax document from 2018, you know it will be in a directory such as [~/Documents/Finances/Taxes/2018 Taxes](#).

Apply Tags

I'll admit I was not an early adopter of using tags; in fact, initially they annoyed me. For years I'd used Finder labels to color-code folders based on their status: in general, yellow meant I'd completed a first draft, red indicated that the work had been reviewed, and purple noted that part of the project was completed. I could see at a glance the status of the various pieces.

But in OS X 10.9 Mavericks, Apple introduced Finder tags, small text descriptors that can be assigned to files and folders. Those color labels

Organize Your Files

To find something in a house or apartment, we start with a mental model of the place. Let's say I've misplaced my keys, which in my house are usually kept on a table by the door. It's more likely I set them down in the living room or kitchen than in the dining room or bathroom, but they could also be in my bedroom, in the pocket of the pants I wore yesterday. With that quick map in my head of the most likely places, I can start searching.

Similarly, it helps to have a mental model of where files are located on your devices, too. Apple does some of this work for you by creating folders in macOS for Documents, Pictures, Movies, Downloads, Music, and other categories; in iOS and iPad OS, files are generally stored with the application that created them or in dedicated iCloud folders (depending on the app) accessible through the Files app.

What's different about the computer compared to a house is that it includes mechanisms for helping you locate what you want. In our real-world analogue, imagine asking out loud "Where are my keys?" and having a team of people go search all the rooms for you. Sounds nice, doesn't it?

In this chapter, we're going to [Understand the Layout](#) of files and folders in macOS, iOS, and iPadOS. That includes the need to [Understand the Desktop](#), which behaves different from most locations. We'll also learn how to organize your files using groups and hierarchical folders, learn how to [Organize Using Tags](#) effectively, [Automate File Organization](#) to let the computer do some of the work for you, and look at how to [Use Information Management Apps](#) for non-Finder approaches.

First, though, let's emphasize high-priority items by creating shortcuts that can help your file management immediately.

Create Priority Shortcuts

This section is all about getting to your important data quickly, regardless of whether you've chosen to organize your files by hierarchical folders, tags, or transmissions from deep space.

Add Items to Finder Windows

When I start a new project, its folder immediately goes into the sidebar of every Finder window. To get to those files quickly, I can create a new window and click that folder in the Favorites list. Here's how to do it:

1. Open a new Finder window by choosing File > New Finder Window, or pressing ⌘-N.
2. If it's not already visible, expand the Favorites list by clicking the disclosure > icon that appears to the right of the name when you move your pointer over it.
3. Navigate to the folder you want.
4. Drag the folder to a spot in the Favorites list (**Figure 6**). Or, choose File > Add to Sidebar (which adds the item to the bottom of the list).

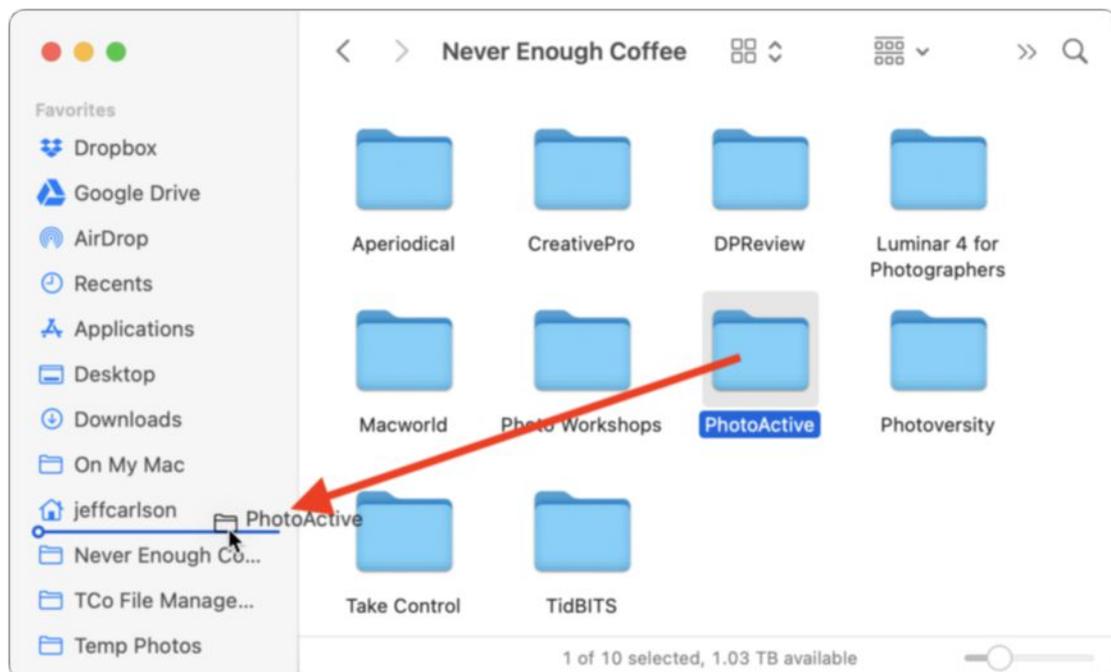


Figure 6: Drag a folder to the Favorites list in the sidebar.

Find Your Files

When we think of file management, it's usually focused on the front end of dealing with files: organizing how and where they're stored, adding metadata like tags to better identify them, and setting up ways to make the process easier. Once a file has been handled, we move on to the next, and then to the next.

That work is all to service the other side of file management: finding those files later, whether that means knowing immediately which directory to open or using search tools to get software to do the work for you.

Find Files in macOS

Apple's Spotlight search technology is woven throughout macOS, collecting results from your web browsing history, contacts, calendar events, and several other sources. For our purposes, of course, I'm focusing on locating files and folders in the Finder.

Filter Files by Tag

I'm getting this one out of the way early because it's quick and easy. Expand the Tags list in the sidebar of a Finder window and select a tag to view only files marked with that tag. You can select only one tag at a time, though, so if you need a more complicated search, keep reading.

Perform Spotlight Searches

Most often, you'll probably want to bring up the Spotlight window, which can be invoked in any app, not just the Finder. It's a good first step, and you can refine the search if needed. To perform a general Spotlight search, do the following:

1. Click the Spotlight  icon in the menu bar, or press **⌘-Space**, to bring up the Spotlight window (**Figure 55**).



Figure 55: The Spotlight Search bar is a fine place to begin.

2. Type anything in the field; results appear as you type, even filling in words that macOS thinks you might be looking for based on recent items (**Figure 56**).

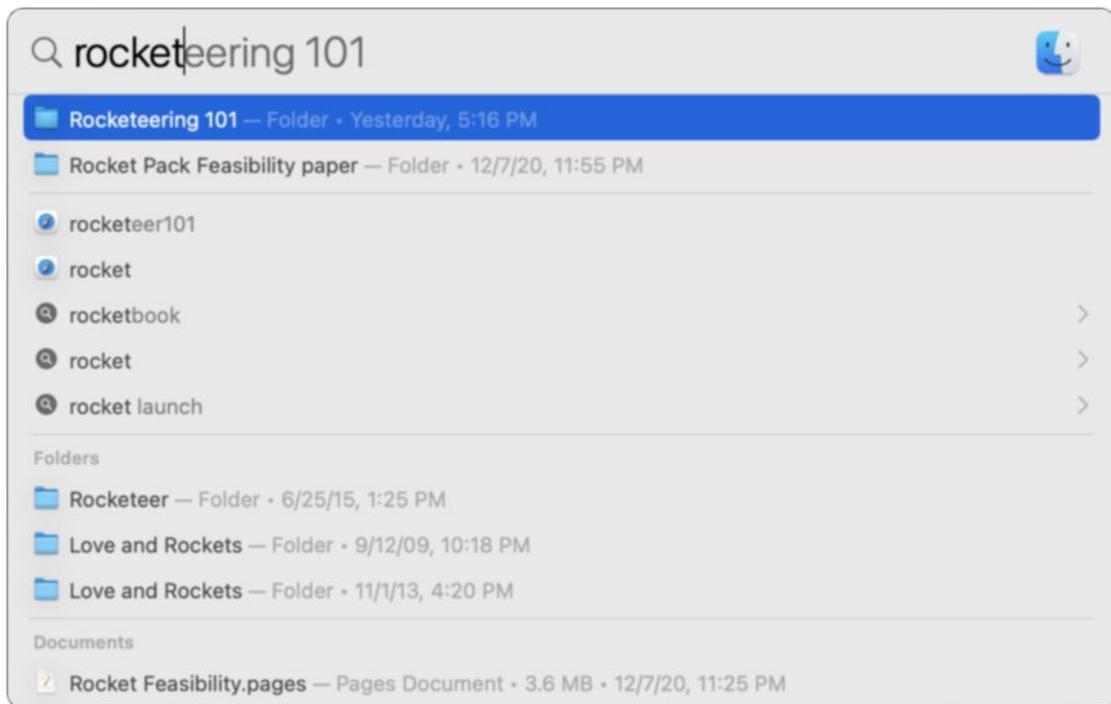


Figure 56: I’ve typed only “rocket” so far, but Spotlight has suggested the Rocketeering 101 folder as the top pick because it has been recently modified.

3. Use the arrow keys or single-click other items in the list to select them, or scroll to view more.
4. With a selection made, press Return or double-click the item to open it and exit the search bar.

Tip: Press the Tab key to display a preview of the selected item in the search results window. Hold the ⌘ key to see the item’s path at the bottom of the preview (**Figure 57**).

Clean Up Your Files

When you clean up old paper files, you're at the mercy of the physical world. Maybe you (or whomever had the files before you) had the prescience to store related files in clearly marked boxes, or perhaps files are completely haphazard. Either way, you must open a box, open each folder, and handle each file.

With digital files, you're not limited to pushing atoms around a space. There's still clutter and stuff to sort through, but you can use the tools and techniques we've covered so far to make quicker work of it.

Set a Cleaning Strategy

Establishing a good file management strategy is primarily about looking forward: how you act on files you will create or receive. As time goes by, that structure makes it easier to locate those files later.

What about the files that existed before you adopted your strategy? They may be organized in similar schemes, or they might be in a condition best described as “a tornado ripped through the filing room.” Either way, you can apply the techniques we've covered to your old files, remove what you don't need, and generally get to a state that's good for your files and your mental health.

Start Easy

In my book [*Take Control of Your Digital Photos*](#), one of the struggles I describe is finding the time to work through the backlog of unsorted photos. It's so easy to say to yourself, “This weekend I'm going to sit down and organize all my old photos!” And then something comes up, or the task is much larger than you expected, or you don't make much progress, and the goal is abandoned.

Dealing with all your files is the same way. Break the job into smaller tasks that are more manageable. At the beginning of this book, I

encouraged you to ask yourself, [What Is the Scope of the File Management?](#) Now, consider the scope of the existing files that need organization. Some possible strategies could include:

- Choose a handful of folders to sort through. Not your entire Documents folder or that nested series of [Old_Documents/Old_Stuff/To_File](#) folders you may have been stashing files in for years. When you finish with your small selection, go enjoy the beverage of your choice and then choose another handful of folders. (Or don't! Take the rest of the day off.)
- Use search queries and smart folders to locate groups of similar files, which may share keywords or tags. Locate projects or clients or school assignments and scan through them.
- Work backward through your archive by date. Set up smart folders to show all the files created in 2017, for example, or in the last half of 2017.
- If you have files with the same identifying information, such as old utility bills, duplicate the rules you created in [Automate with Hazel](#) that are currently watching for new files in the Downloads folder and point them at your old files.
- Take advantage of existing folder hierarchies and adapt them to your current system. Maybe you already have folders for bills and bank statements, but they're in separate locations.
- If all the older files are thrown together haphazardly, maybe you keep them in place but assign tags to them, saving you the trouble of moving files into other folder hierarchies.
- [Find and Eliminate Duplicates](#) to cut down the amount of clutter overall.
- [Free Up Storage Space](#), which is often a quick way to delete large unnecessary files or folders and give you the satisfaction of recovering large amounts of storage space.

Most of all, remember that cleaning up files does take time. You will run into situations where you'll need to dig into folders of files to

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Shameless Plug

I produce a lot of creative material—something which I'm honored to be able to do—including photographs, books for Take Control and Rocky Nook, the [PhotoActive podcast](#), and articles for Macworld, DPReview, CreativePro, and other outlets. Find my work at jeffcarlson.com and sign up for my [low-volume newsletter](#) to learn about new projects and occasional deals and giveaways. Thank you!

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