

Safely Backup Your Critical Documents

What, Where, How

Stepping into the Cloud



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Today's Speakers

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BNN board member and owner of Earth Shakes
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Agenda

1. Why backup documents
2. **What?** What should you store?
3. Preparing documents for storage
4. **Where?** Storage locations
5. **How?** Demo - Storing in the Cloud, and in App-based Notes storage
7. Cloud security
8. Resources
9. Q&A, Wrap

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Why backup your documents?

Backing up your critical document and family keepsakes, protects them with redundancy.

Rest easy, knowing your important files are backed up in case of loss from fire/water. Or should your computer be damaged or stolen.

“Remember, when disaster strikes, the time to prepare has passed.”

Steven Cyros

“It wasn’t raining when Noah built the ark.”

Howard Ruff

Select your Documents

ID, Licenses, Certifications for Each Family Member & Pets

Driver's License / ID

Social Security Card

Passport

Birth & Death, Marriage certificates

Work Permits / Licenses

Veteran/Discharge papers

Gun permit

Immigration papers

Emergency Contact List (Phone, Email)

Pets (adoption, medical / vaccination docs)

Photos & Videos

Current Photos of each family member + pets

Important family pictures (keepsakes)

Documentation of valuables (video or photo inventory)

Other Important Information

Bank / Investment accounts

Credit Card accounts

Business Records

Income Tax Returns

Employment contracts, pay stubs

Stock and Bond certificates

Collections or jewelry documentation

Home/Auto Insurance policies, Agent data

Trusts, Wills, Legal & Medical Power of Attorney

Real Estate deeds, mortgage papers

Auto pink slip, registration, loan, service records

Rental / lease agreements

Medical Records

Medical team / Dr. contacts for family

Medical history records, for family members

Vaccination records, allergies, blood types

Health Plan data

Advance Directives, Med Power of Attorney

ICE phone contact (In Case of Emergency)

For specific medical conditions:

Consider creating a computer document titled "ICE" (in case of an emergency) to capture important details about any medical circumstances that emergency medical personnel may need to know. Backup a copy of this ICE document..

Preparing Documents for Storage

Desktop scanners - Great for large jobs

Automatic document feeding and two-sided scanning are valuable features.



Smartphone scanning apps - For small jobs these are quick

- These apps automatically re-size images, and deliver good contrast
- And apps export images directly to your email or cloud storage



Scanning services - Copy shops, UPS, FedEx (\$.10-.20 per page)

Tips

- Save in PDF format; it's universal
- Name files consistently - so you can quickly locate any file forever
 - > Suggest naming folders by year, with sub-folders such as *Household Purchases*, *Bank Accounts*, *Medical*, *Insurance*
 - 2021 > Household Purchases > GE Refrigerator,
 - 2020 > Bank Accounts > BofA March 2020 Statement

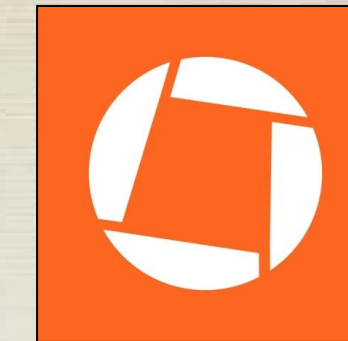
Scanning Apps for Mobile Phones

Best document scanning app reviews (2021) for digitally archiving files with mobile devices

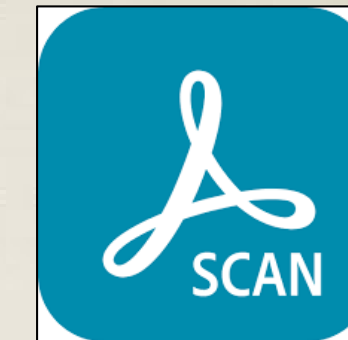
- Create multi-page PDF documents
- Apps use your smartphone camera to create documents

<https://www.techradar.com/best/best-document-scanning-apps>

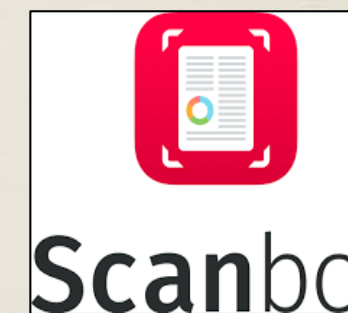
Genius Scan



Adobe Scan



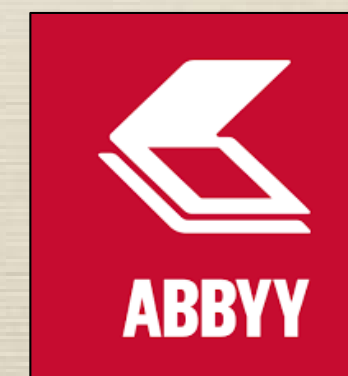
Scanbot



CamScanner



Abbyy
FineScanner



Genius Scan Tutorial



GeniusScan tutorial: <https://www.youtube.com/watch?v=MopaBFfXQ04>

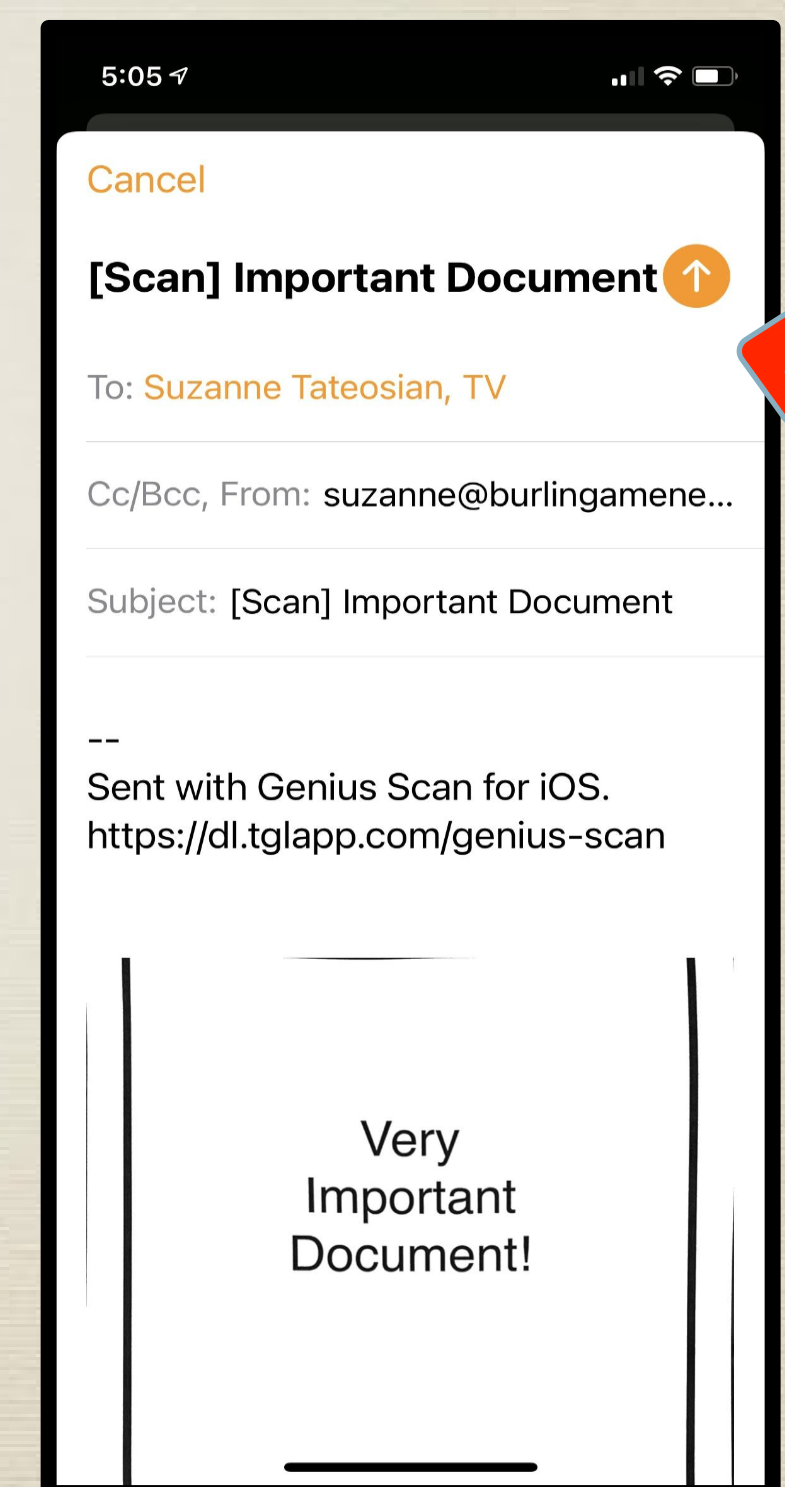
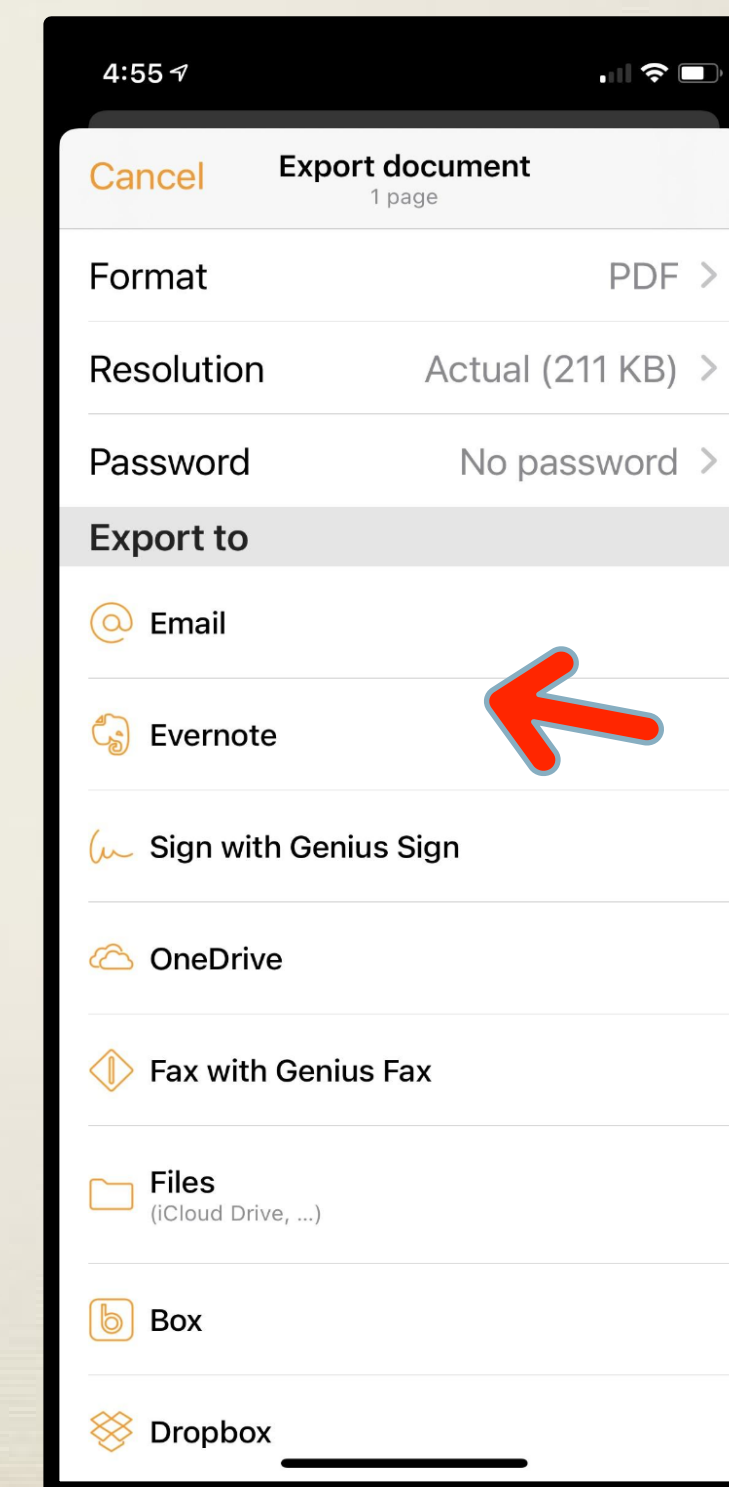
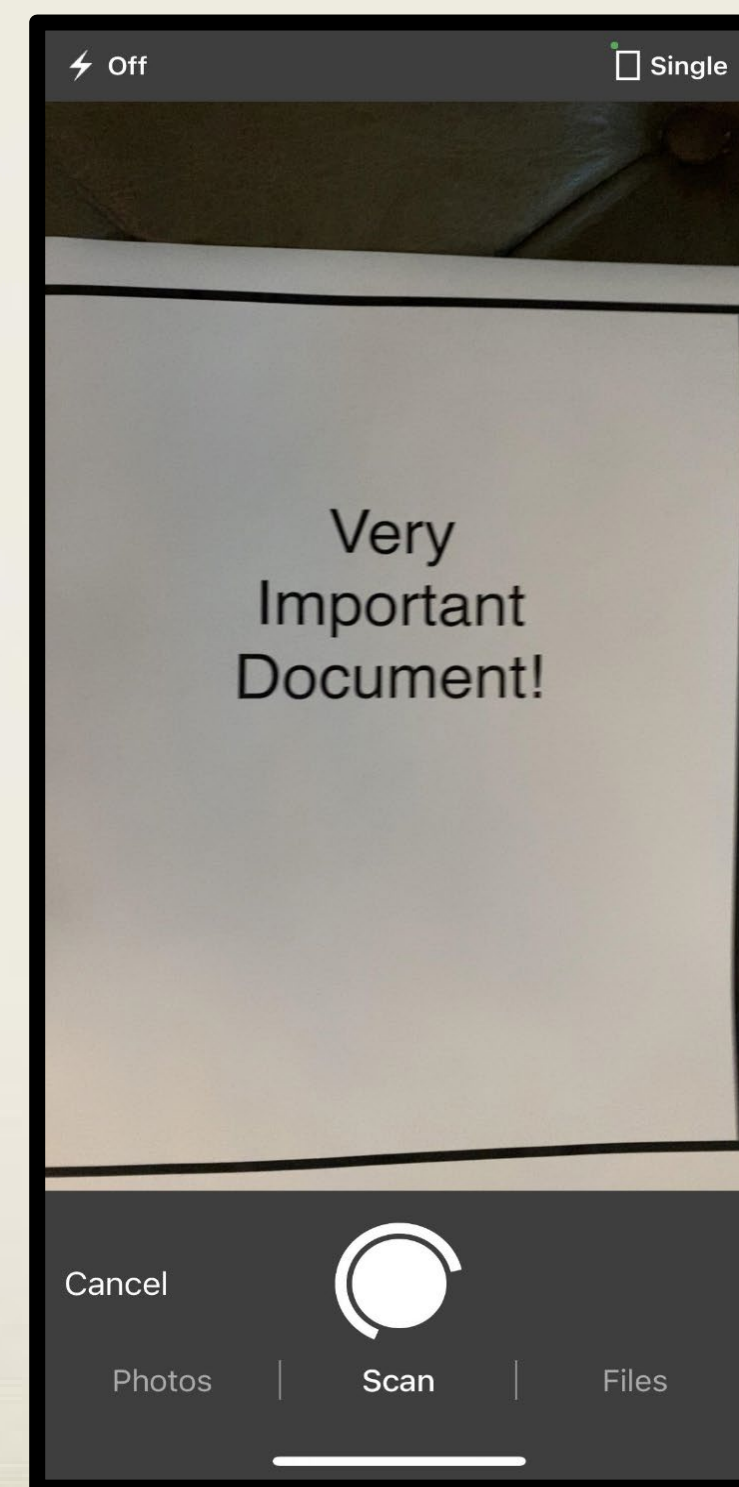
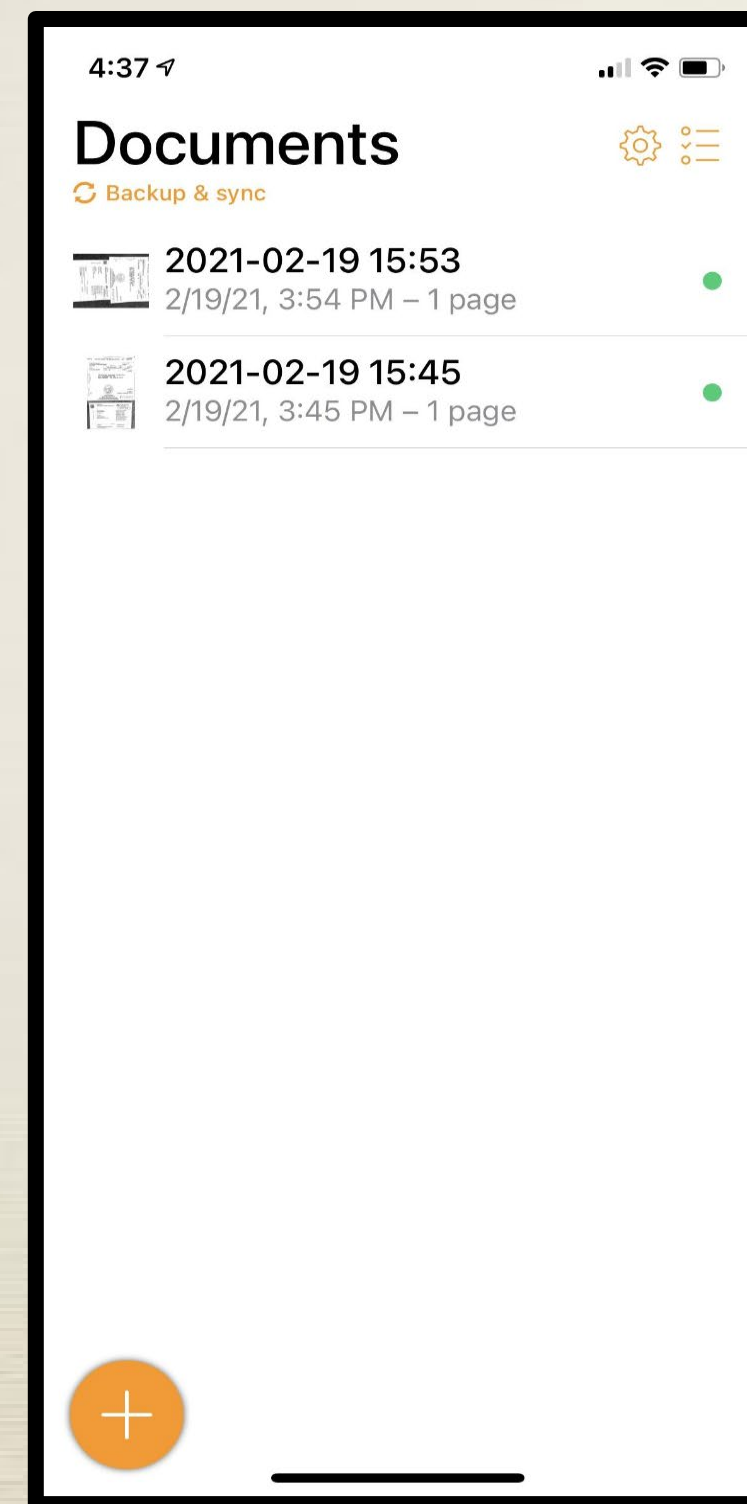
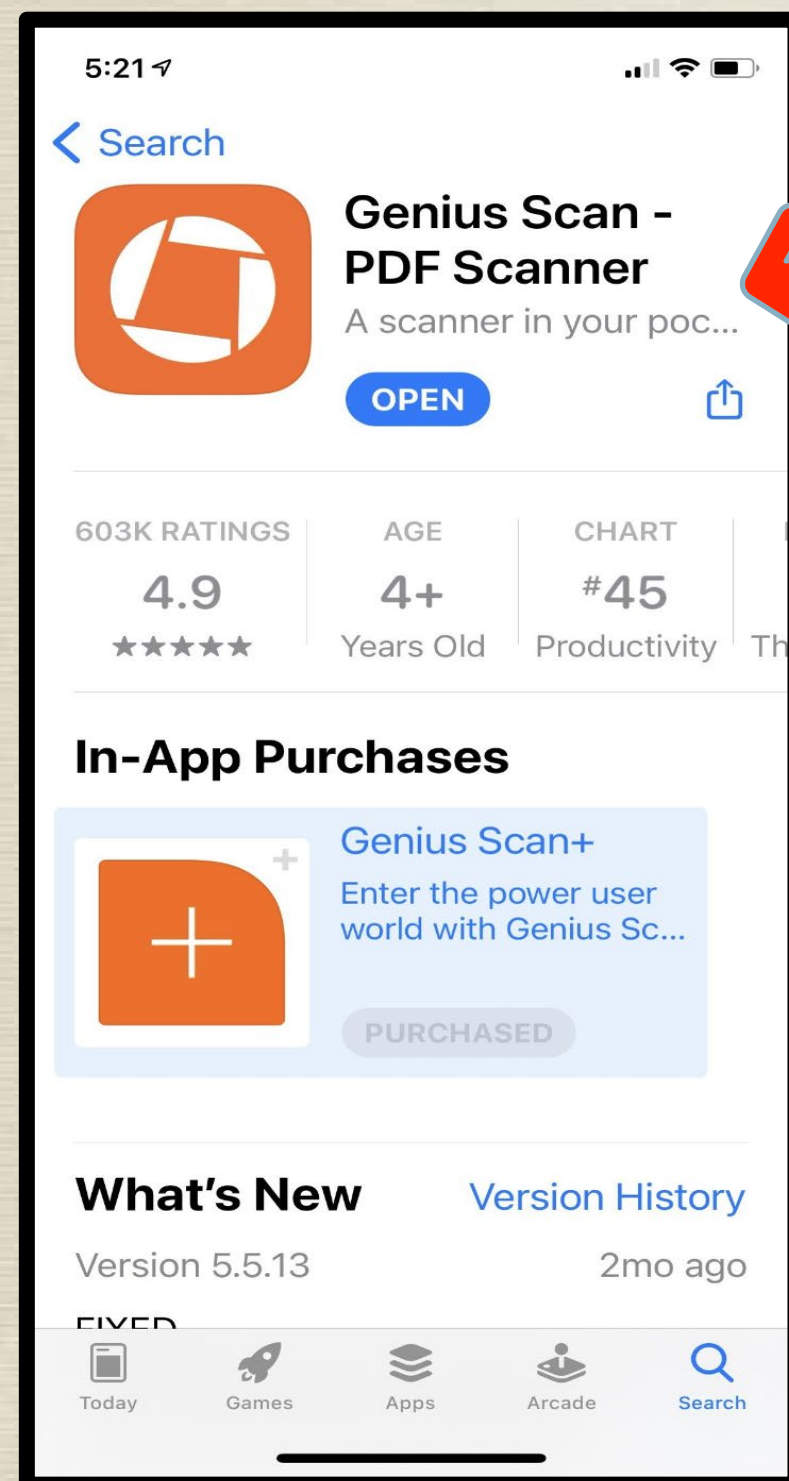
Download Genius Scan from the App store. Open the App and register.

Click the “+” icon to get started.

Line up your document in the screen and click the “scan” icon.

Select where you want to send your document (i.e. email).

Send your document.

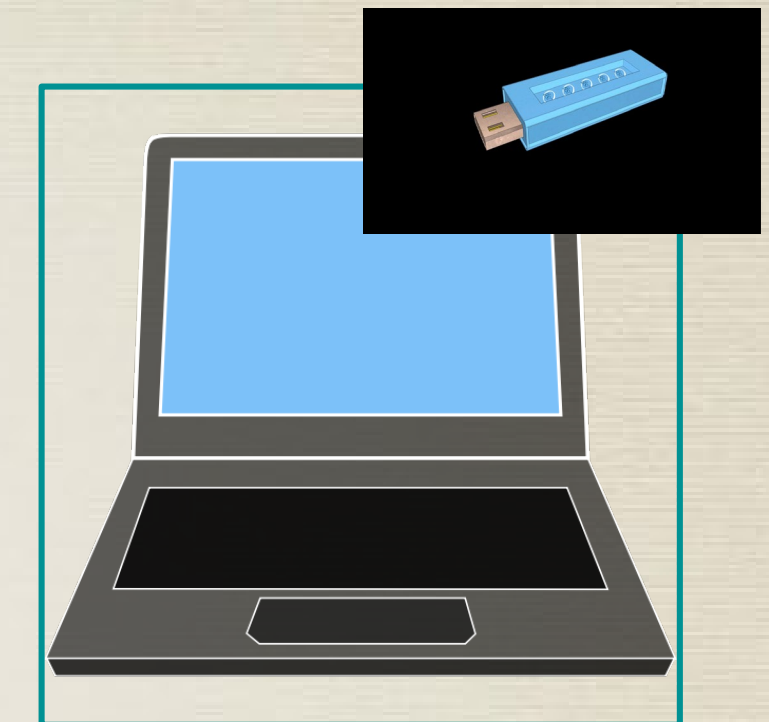


Storage Locations

Consider a combination!



- Hardcopy binder
- Your computer (internal hard drive, or flash drive)
- External hard drive
- Cloud/Internet Storage (on remote servers)



Hardcopy Binder storage

Tried and true, this works, too!

Simply make photocopies of documents and photos.

- Organize into categories
- Collect in a binder or file box
- Store off-site (family member's house)

Data Digital Storage Choices

Computer Hard Drive

Save your documents on the hard drive in your laptop or desktop computer.

Flash Drives

You can plug in a small portable USB flash drive, and save limited file volumes to that device as another location option. Then store offsite in a secure place.

Caution: While flash drives are affordable they are not always durable, and they can be easily misplaced - so not recommended for long-term data storage.

External Hard Drive

You can backup your entire hard drive, and even set up automatic backup.

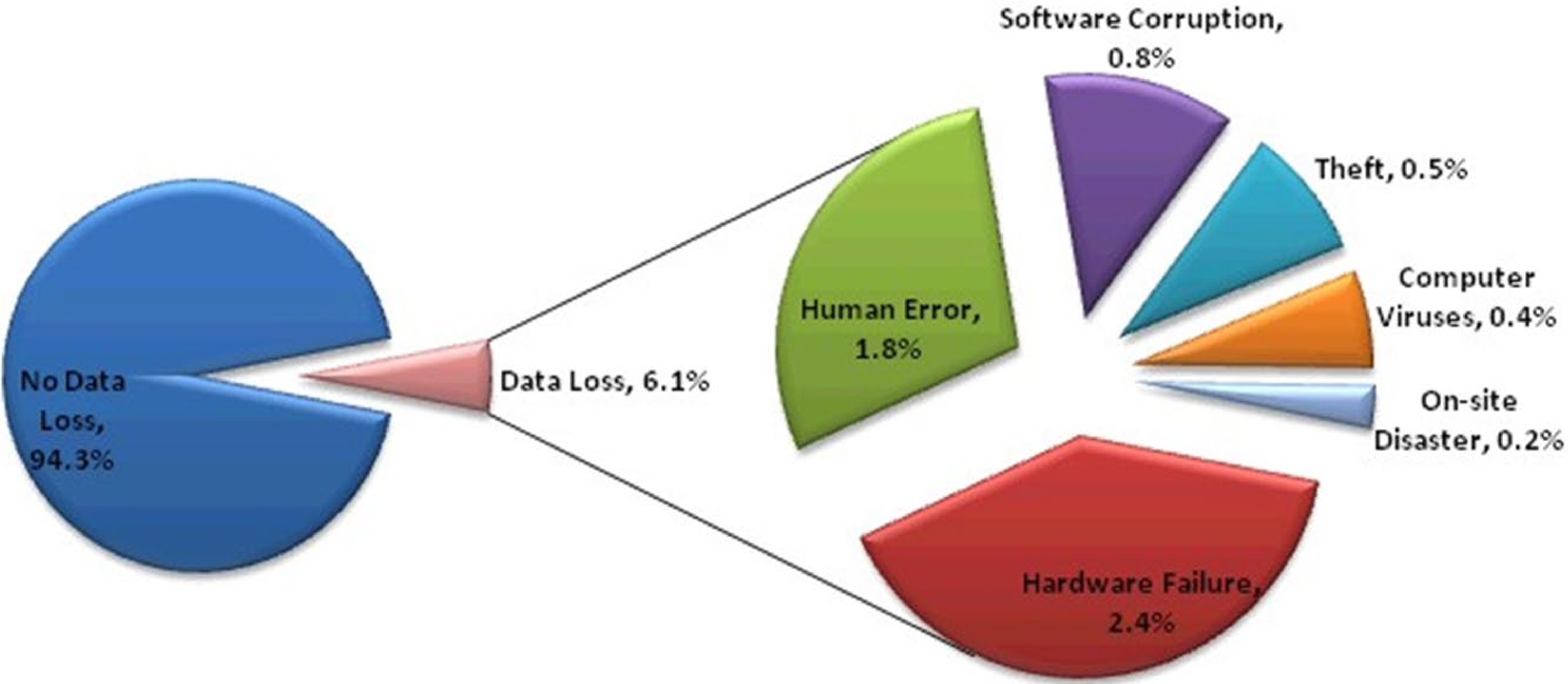
Connect the external hard drive and use your computer's built-in sync capability to download files to the external hard drive (Windows Backup, or Mac Time Machine).

Popular brands: Seagate, Western Digital, Lenovo (cost ~ \$70 for 1 terabyte)

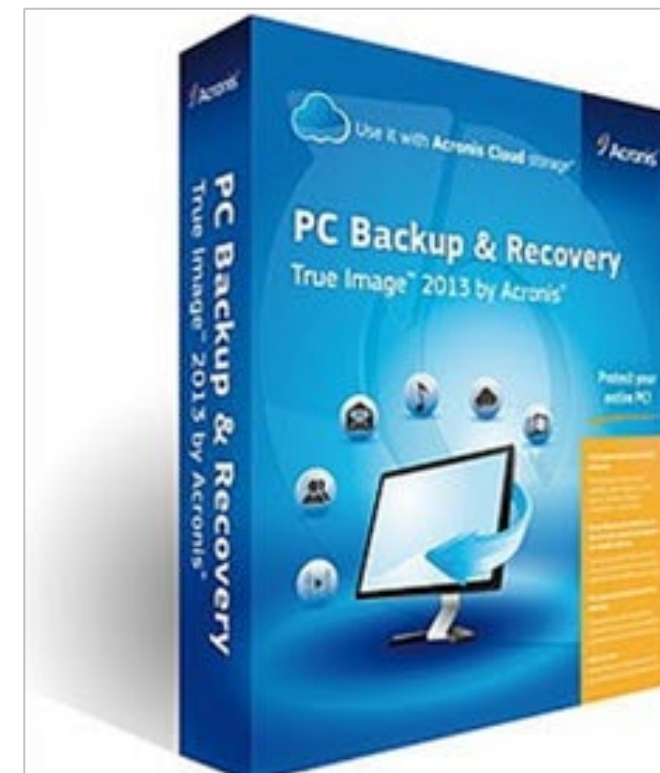
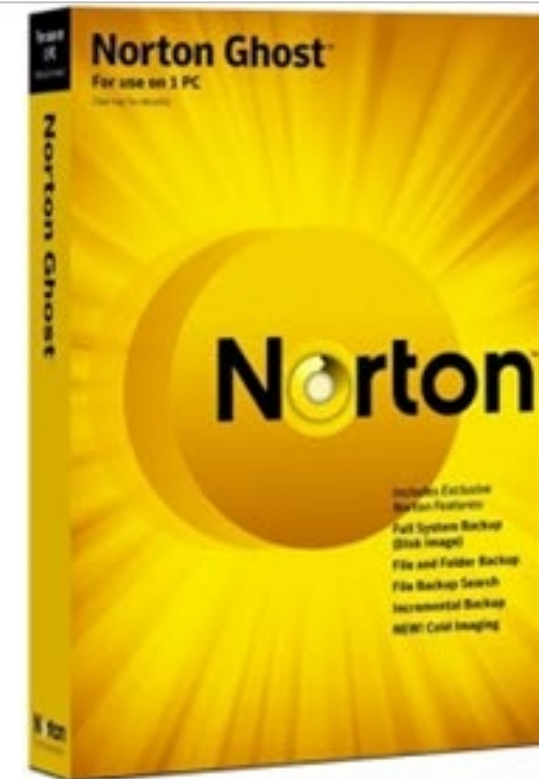
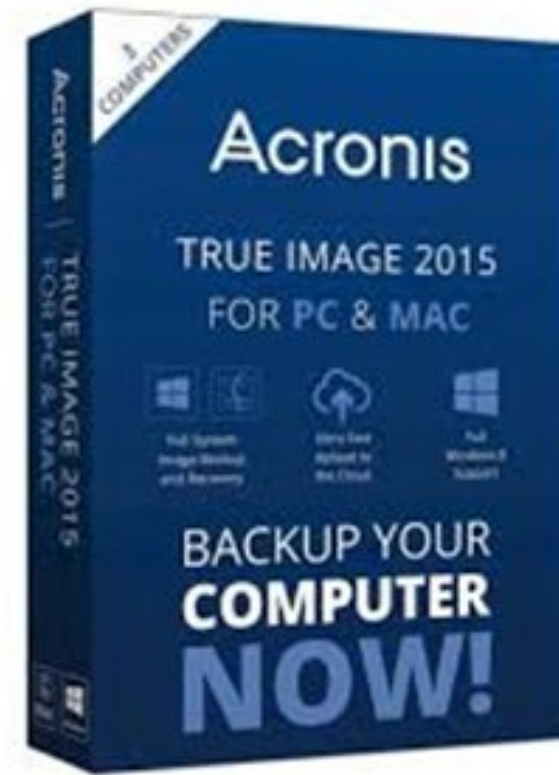
Store off-site and in a secure place (i.e. fireproof safe)

Likelihood of Data Loss Incidents in One Year per PC

Source: The Cost of Lost Data, David M. Smith,
Graziadio Business Report, Pepperdine University



Backup Software Products



Cloud / Internet Storage

To store online, you need to sign-up for a cloud storage service account.

Cloud services offer:

- Online servers are safer (more hazard and theft protection) than a hard drive
- Basic free storage, then reasonable subscription fees for added space
- Data can be accessed from anywhere via internet, on laptop, tablet, cell phone
- Most allow you to share files with anyone you choose
- Some allow you to take notes in addition to document/data storage

Established Cloud Storage Service providers include:

→ iCloud, Google Drive, MSOneDrive, Box, iDrive, Nextcloud, MegaBackup, Drop Box, Evernote, CertainSafe Digital Safety Deposit Box, Apple Notes, GoogleKeep and many others

Cloud Security

Cloud storage services should protect your documents with end-to-end encryption.

A big, established provider is recommended, no reason to try a startup.

Consider:

- Security protections once data leaves your device
 - Encryption to safeguard if breached, is there encryption during migration?
- How will your data be managed and stored
- Access to data - timeliness and cost

How?

Demo: Storing in the Cloud

Now we'll demonstrate how to store a document using different services ...

Bryce Martens

Microsoft OneDrive

Google Drive

Suzanne Tateosian

iCloud Document Storage

Evernote Document and Notes Storage

Resources

How to organize critical documents:

<https://theprovidentprepper.org/how-to-organize-critical-documents-for-emergency-evacuation>

Document storage options:

<https://www.nytimes.com/wirecutter/blog/5-cheapish-things-backing-up-your-stuff/>

Cloud storage of documents and file sharing services:

<https://www.pcmag.com/picks/the-best-cloud-storage-and-file-sharing-services>

Cloud storage with App-based notes and documents services:

<https://zapier.com/blog/best-note-taking-apps/>

<https://www.techradar.com/best/best-note-taking-app>

Scanning Apps for smart phones review:

<https://www.techradar.com/best/best-document-scanning-apps>

Scanning App tutorials

GeniusScan tutorial: <https://www.youtube.com/watch?v=MopaBFfXQ04>

Adobe Scan tutorial: <https://www.youtube.com/watch?v=tsDuKTnRGuU>

Scanbot tutorial: <https://www.youtube.com/watch?v=kvo6ItOJeFo>

CamScanner tutorial: <https://www.youtube.com/watch?v=iZRaIwludu8>

Abbyy FineScanner tutorials: https://www.youtube.com/watch?v=mfR0IXO_MV0

<https://www.youtube.com/watch?v=XvNgsRUygIo>

Resources

Established Cloud providers

- iCloud - Apple offers users 5GB free; Windows/PC users can sync with iCloud Drive
- Google Drive - 15GB free; syncs with Android, Windows and Mac use with desktop app for easy drag-and-drop
- MS OneDrive - offers 5GB free; via Windows file explorer, or Android and IOS access through an app; includes free access to MS Office Online (Word, Excel, PowerPoint, OneNote)
- Dropbox - offers 2GB free, personal subscriptions available
- Evernote - for the ultimate digital notebook - free subscription, premium services available
- Microsoft OneNote - for a free note-taking and document storage app
- Apple Notes - for Apple users
- Google Keep - for Google power users

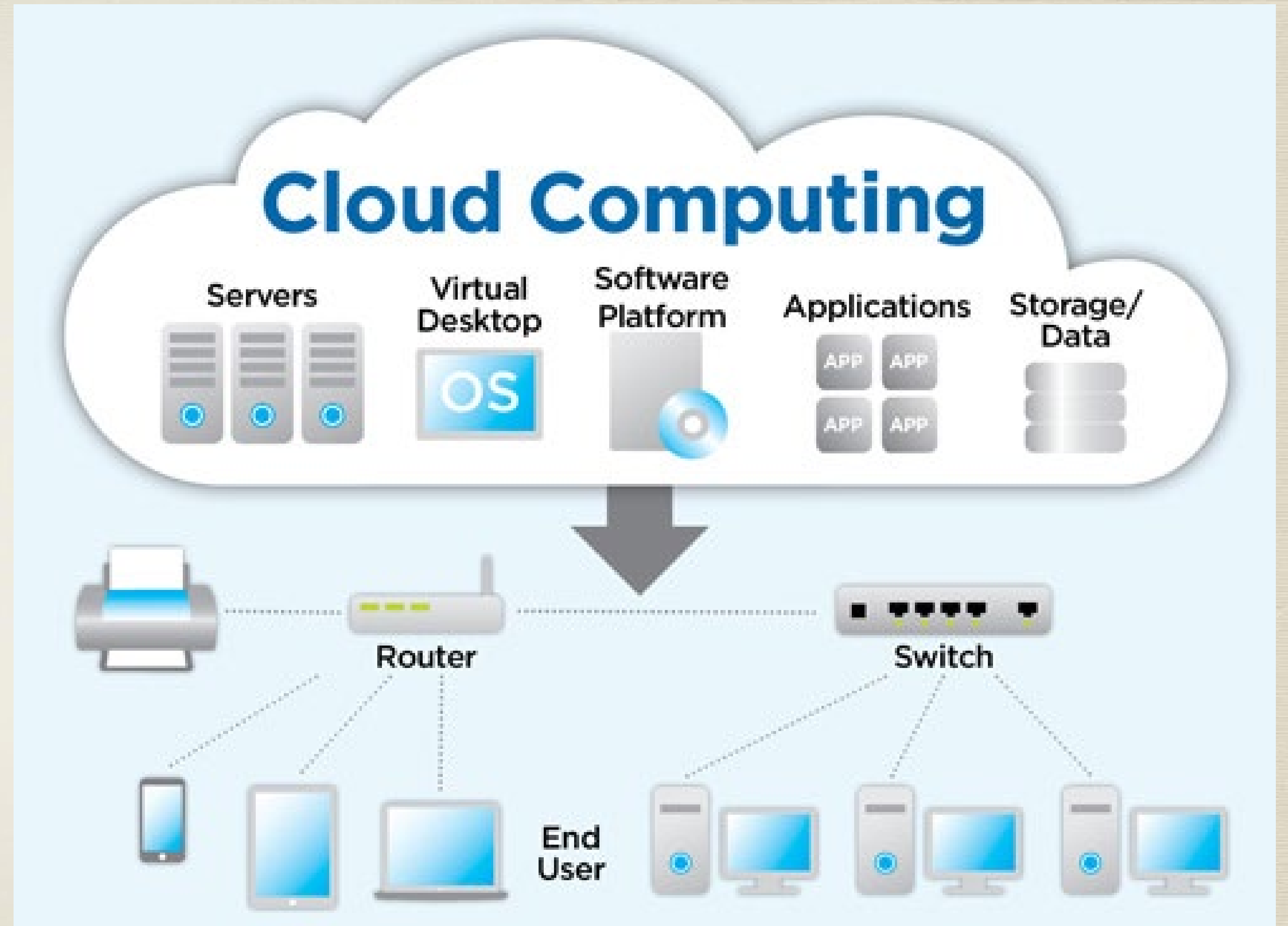
Also: Box, iDrive, Nextcloud, MegaBackup, and plenty of other services.

Questions Welcome

Thank You

Appendix

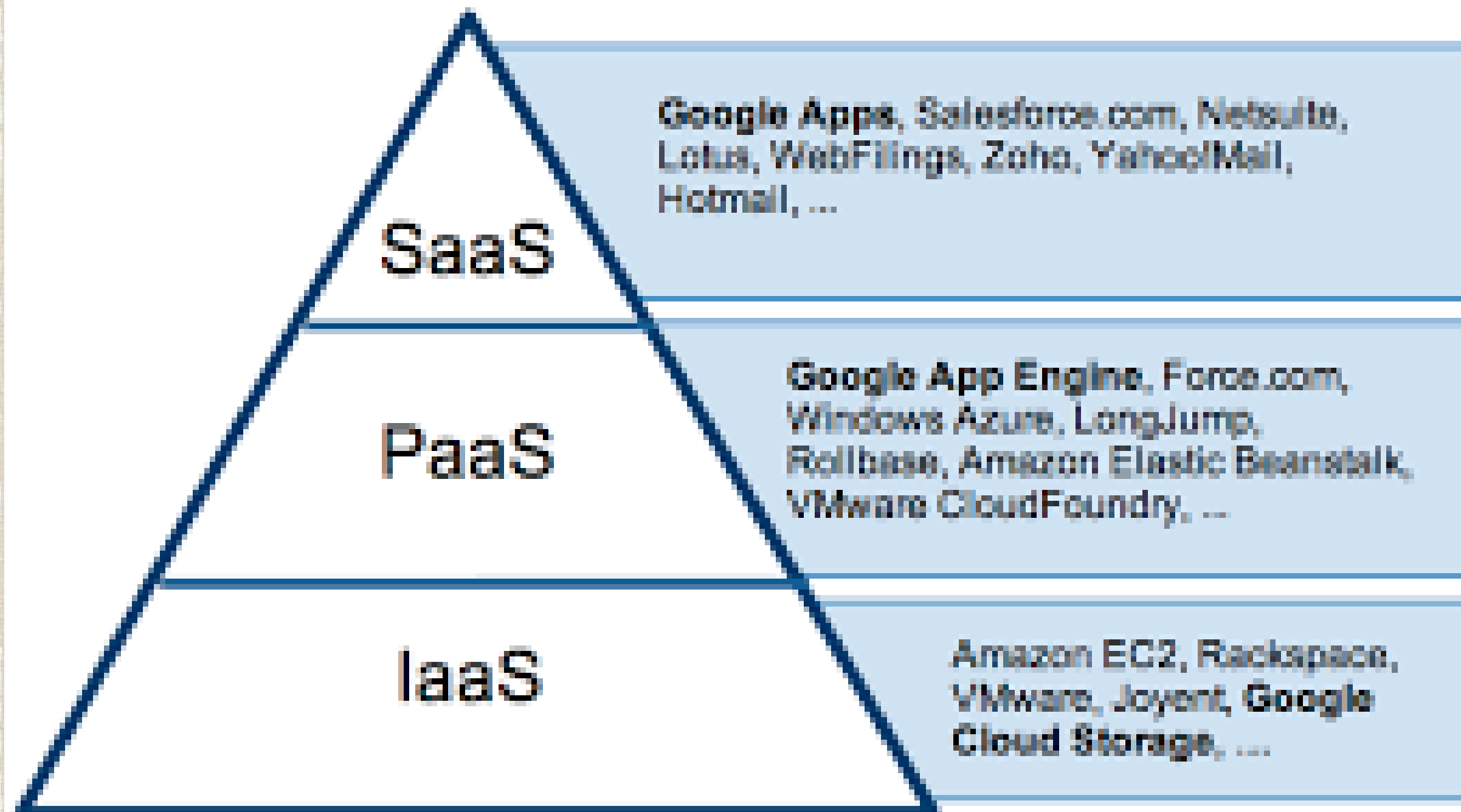
What is the Cloud?



What is the Cloud?

Don't think we need this slide, just for our discussion today...

Cloud Computing as Gartner Sees It



Source: Gartner AADI Summit Dec. 2009

Types of Cloud Deployment Models



In Real Life

A few years ago, we had to evacuate because of wildfires. While my neighbors were loading their cars with large, heavy boxes of files, I just grabbed a drive full of my digitized documents - and had more room in the car for other items.

Scott Kramer, Southern California resident

Storing Documents in the Cloud

Cloud Storage Services Options

PC Mag

Best Document & File Sharing Services

<https://www.pcmag.com/picks/the-best-cloud-storage-and-file-sharing-services>

- **Microsoft OneDrive**
- **Drop Box**
- **CertainSafe Digital Safety Deposit Box**

Documents storage and file sharing services:

If you're working from home, there are few things more important than sharing your work documents remotely with fellow team members.

Online file storage, syncing, and sharing services can play a huge role in accomplishing this.

Techradar

Best Note-Taking Services (with document storage)

<https://www.techradar.com/best/best-note-taking-app>

- **Evernote** for the ultimate digital notebook
- **Microsoft OneNote** for a free note-taking app
- **Apple Notes** for Apple users
- **Google Keep** for Google power users

Documents and note storage services:

The beauty of **cloud storage servers with note** technologies is that a copy of my documents are stored on the servers, and backed up by them. However, unlike some other **cloud** services (e.g., Google Calendar), my data is also **stored** locally on my hard drive as well. I can also create notes to accompany my documents.